



**Director's Station End User
Training Guide
(Version 3.8.7.1)**

DOC-DRETGEN-ALL

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Introduction

Training Overview

Who should attend?

This course is intended for the users who want to access library information through the use of Director's Station reports.

Prerequisite

No class is required; however, it is recommended that participants review the Director's Station CD before attending this class.

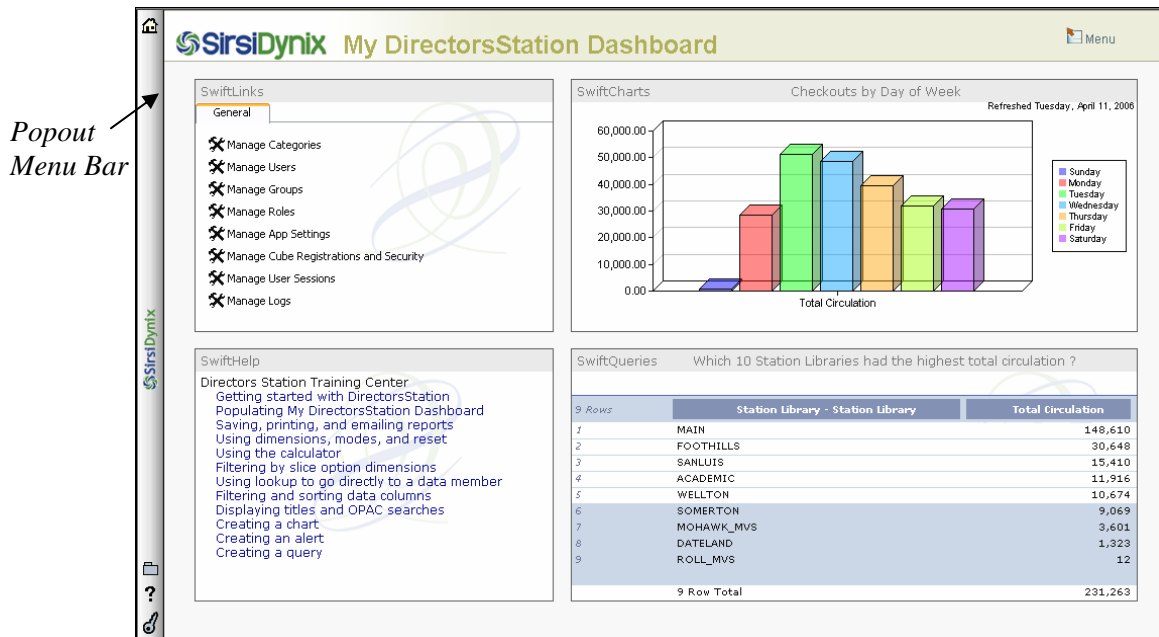
Course Goals

After completing this course, participants will be able to:

- Identify the components of the Dashboard
- Create a report
- Create a chart
- Create an automatic alert
- Create a query
- Add a shared and remove a report or chart to your personal SwiftView
- Save and remove a report to public folders

Director's Station Overview

Dashboard and Popout Menu



The Dashboard is the starting point for collection analysis. The Dashboard can be divided into the following sections:

- **SwiftAnalysis** – A list of delivered and customized reports
- **SwiftAlerts** – Notifications for data that has crossed a set threshold
- **SwiftCharts** – Graphs created from reports
- **SwiftQueries** – A list of natural language questions to help the user analyze data
- **SwiftHelp** – A list of training films delivered to assist in working with Director's Station.

Popout Menu Bar

The Popout Menu includes the following folders or categories.

- **About Directors Station** – This section contains a short introduction to the purpose of Director's Station.
- **Multimedia Training Films** – View these instructional films to learn how to use Director's Station. These films are also found on your Director's Station CD.
- **Help Documentation** – The training guides listed in this category were created by SwiftKnowledge, Inc.
- **Collection Analysis** – This folder contains reports designed to access your Unicorn data.
- **Public Access Analysis** – This folder contains information about iBistro searches. In a future release, it will also contain information about other user-initiated functions such as online renewals and access to online databases.
- **My Folder** – Use this folder to organize customized reports, alerts, links, and documents.
- **About NDP** – The Normative Data Project is a compilation of transaction-level data from libraries throughout North America. A login to NDP is supplied to users when Director's Station is purchased.

Popout Menu

My DirectorsStation Dashboard





SwiftCharts: Checkouts by Day of Week (Refreshed Tuesday, April 11, 2006)

Day	Total Circulation
Sunday	~1,000
Monday	~25,000
Tuesday	~55,000
Wednesday	~50,000
Thursday	~40,000
Friday	~35,000
Saturday	~30,000

SwiftQueries: Which 10 Station Libraries had the highest total circulation ?

Station Library - Station Library	Total Circulation
1 MAIN	148,610
2 FOOTHILLS	30,648
3 SANLUIS	15,410
4 ACADEMIC	11,916
5 WELLTON	10,674
6 SOMERTON	9,069
7 MOHAWK_MVS	3,601
8 DATELAND	1,323
9 ROLL_MVS	12
9 Row Total	231,263

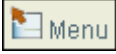
The Popout Menu bar contains the following icons.

Icon	Description
	Home – Click this icon at any time to return to your Dashboard.
	Manage My Folder – Allows you to upload, organize, and manage your documents and reports.
	Help – There are currently no pre-packaged help files. Please refer to the Director's Station CD or this training guide for help.
	Log Off – Click this icon to exit Director's Station.

My SwiftView

Whenever a user is logged in to Director's Station, he is associated with a personal Dashboard that is called a SwiftView. When a user is first created, he will have a blank template SwiftView. The administrator will assign a SwiftView to new users.

To select a SwiftView

1. Log in as a new user.
2. Click .

3. Scroll down to **Select SwiftView**.

The screenshot shows the SirsiDynix My DirectorsStation Dashboard. On the left, there are sections for SwiftLinks (General) and SwiftHelp. The main area contains a SwiftCharts bar chart titled 'Directors' showing 'Total Circulation' by day of the week. A context menu is open over the chart, listing options: Panel Layout..., Select SwiftView (highlighted), Save SwiftView, Copy SwiftView To, and Delete Current SwiftView. Below the chart is a SwiftQueries table titled 'Which 10 Station Libraries had the highest total circulation ?'.

9 Rows	Station Library - Station Library	Total Circulation
1	MAIN	148,610
2	FOOTHILLS	30,648
3	SANLUIS	15,410
4	ACADEMIC	11,916
5	WELLTON	10,674
6	SOMERTON	9,069
7	MOHAWK_MVS	3,601
8	DATLAND	1,323
9	ROLL_MVS	12
9 Row Total		231,263

4. Click on the named SwiftView.

Note The SwiftViews listed are determined by the group assigned to the user.

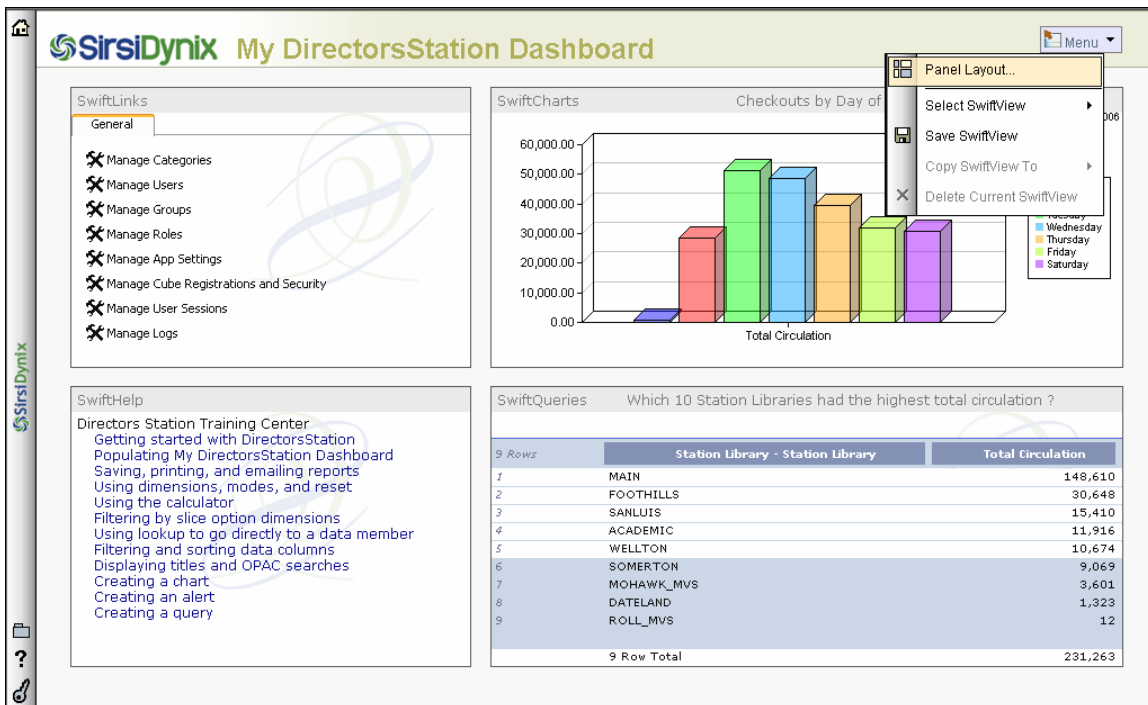
5. Click **Save SwiftView**.

Now the SwiftView is associated with the new user. All changes made to the SwiftView from this point forward are saved to the user's personal Dashboard.

Changing the Panel Layout

To Select a Panel Layout

1. Click .
2. Click **Panel Layout**.



The screenshot shows the SirsiDynix My DirectorsStation Dashboard. The 'Menu' dropdown is open, showing options: Panel Layout..., Select SwiftView, Save SwiftView, Copy SwiftView To, and Delete Current SwiftView. The 'Panel Layout...' option is highlighted.

SwiftLinks - General

- Manage Categories
- Manage Users
- Manage Groups
- Manage Roles
- Manage App Settings
- Manage Cube Registrations and Security
- Manage User Sessions
- Manage Logs

SwiftCharts - Checkouts by Day of

Bar chart showing Total Circulation by day of the week. The y-axis ranges from 0.00 to 60,000.00. The x-axis shows days of the week. The legend indicates: Wednesday (blue), Thursday (orange), Friday (green), Saturday (purple).

SwiftQueries - Which 10 Station Libraries had the highest total circulation ?

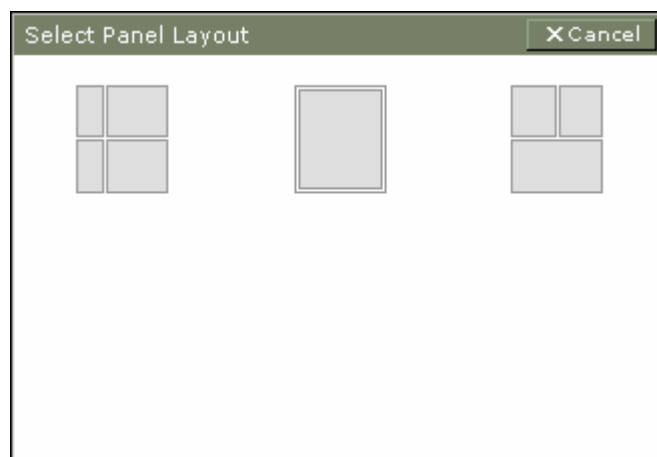
9 Rows	Station Library - Station Library	Total Circulation
1	MAIN	148,610
2	FOOTHILLS	30,648
3	SANLUIS	15,410
4	ACADEMIC	11,916
5	WELLTON	10,674
6	SOMERTON	9,069
7	MOHAWK_MVS	3,601
8	DATLAND	1,323
9	ROLL_MVS	12
9 Row Total		231,263

SwiftHelp

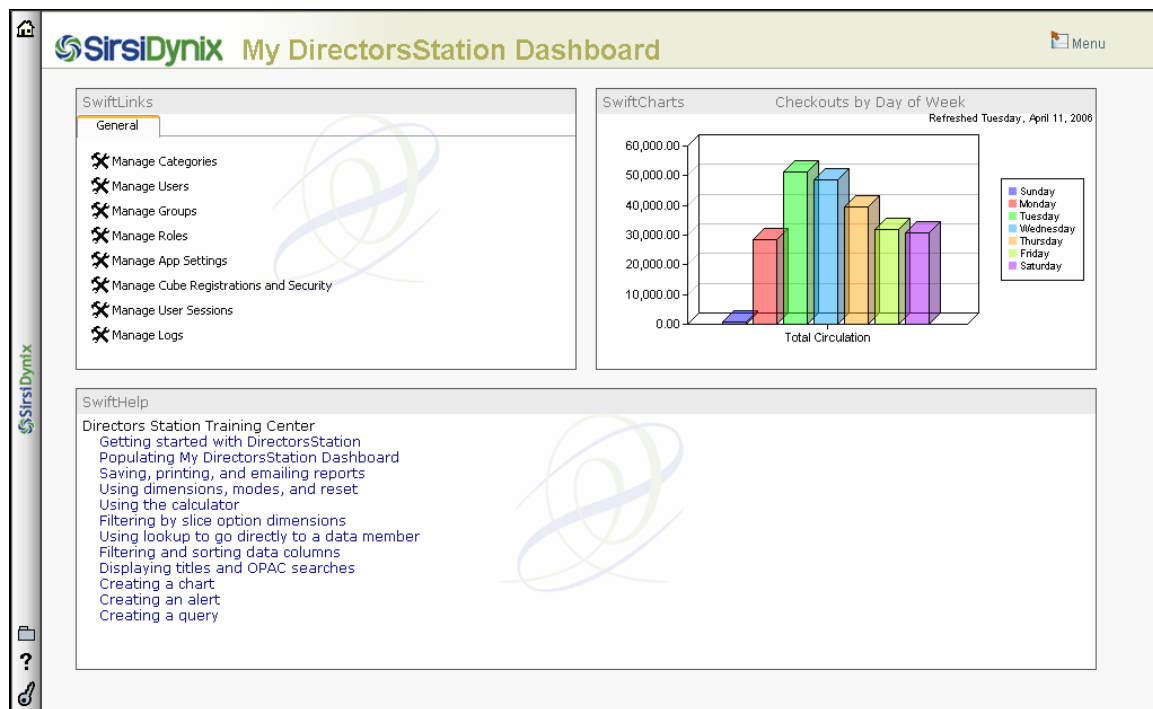
Directors Station Training Center

- Getting started with DirectorsStation
- Populating My DirectorsStation Dashboard
- Saving, printing, and emailing reports
- Using dimensions, modes, and reset
- Using the calculator
- Filtering by slice option dimensions
- Using lookup to go directly to a data member
- Filtering and sorting data columns
- Displaying titles and OPAC searches
- Creating a chart
- Creating an alert
- Creating a query

3. Select a panel from the three options given.



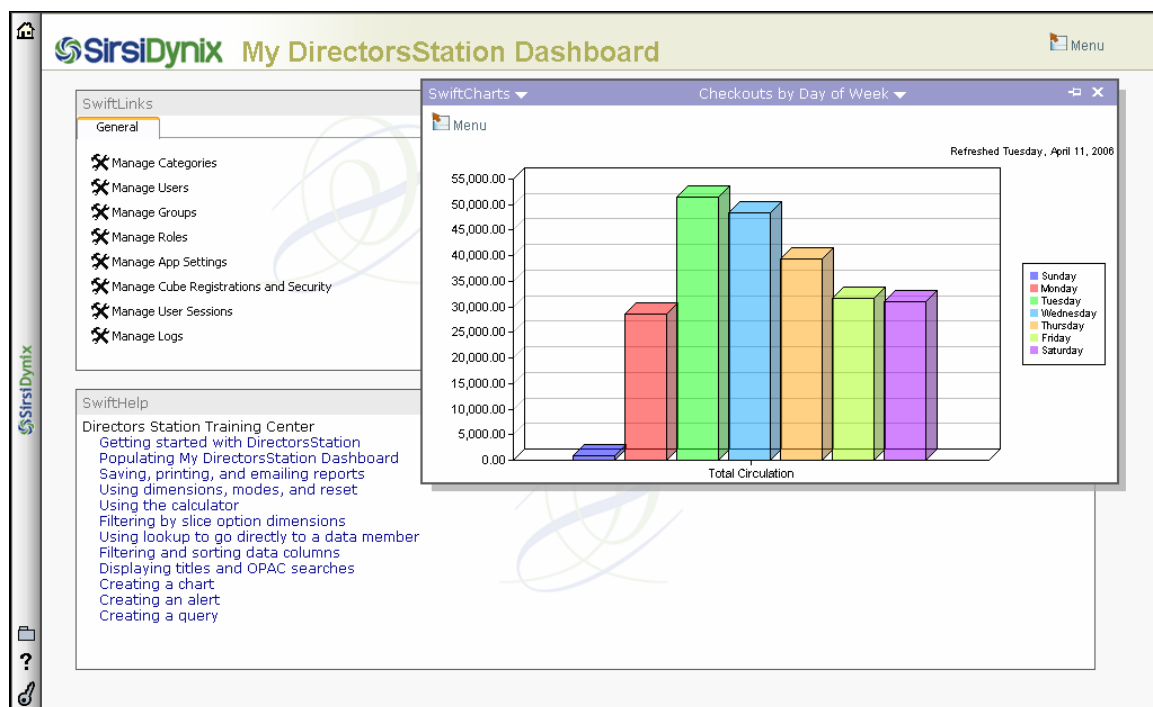
4. The appearance of the Dashboard changes.



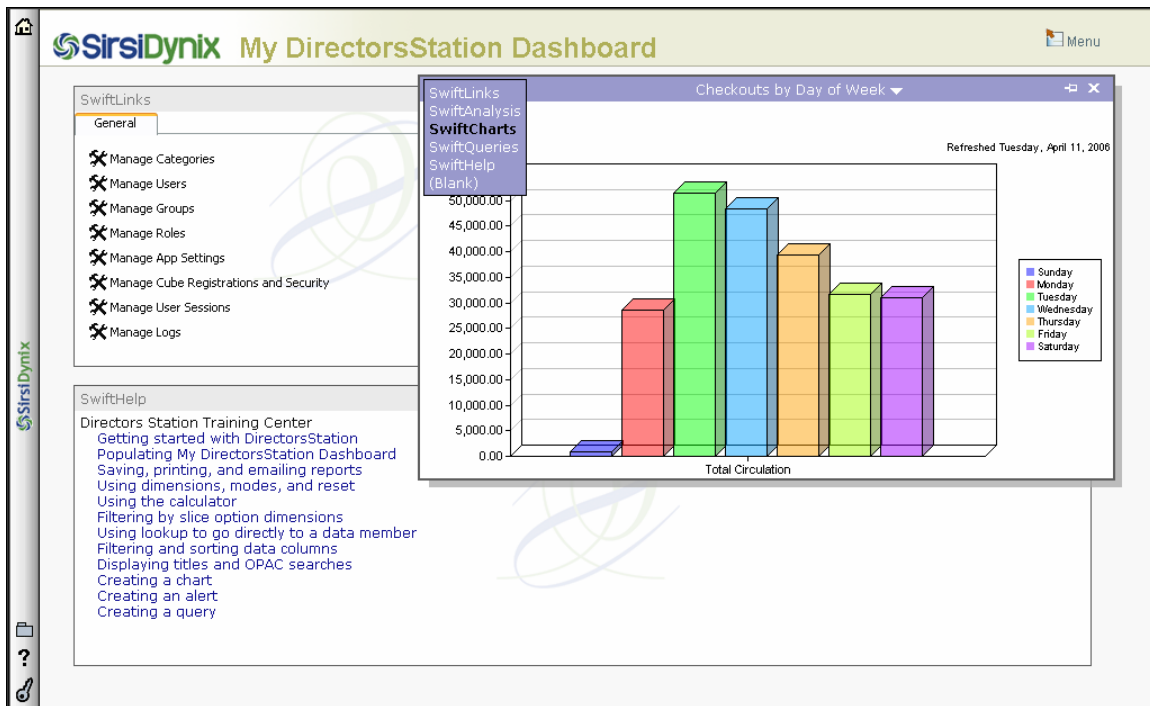
Changing the Panel Content

To Change the Panel Content

1. Click on the chart panel to expand it.




- Click the **SwiftCharts** white down arrow in the top left corner of the panel. A list of panel types appears.

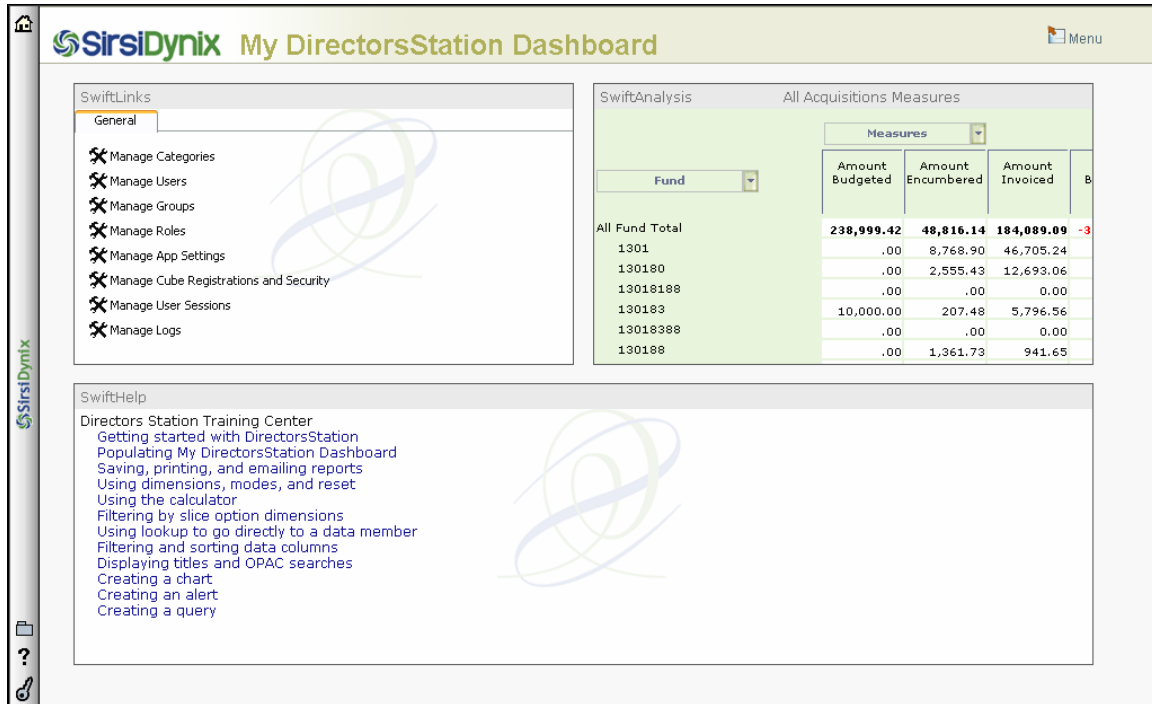


- Click on a different panel name in the list. The new panel appears in the expanded view.

The screenshot shows the SirsiDynix My DirectorsStation Dashboard with the SwiftAnalysis panel expanded. The panel displays a table of financial data for various funds. The table has columns for Amount Budgeted, Amount Encumbered, Amount Invoiced, Cash Balance, Free Balance, Amount Paid, Fundings Paid, Copies Ordered, Copies Funded, Copies Received, and Copies. The data is organized by fund, with a total row at the top.

	Amount Budgeted	Amount Encumbered	Amount Invoiced	Cash Balance	Free Balance	Amount Paid	Fundings Paid	Copies Ordered	Copies Funded	Copies Received	Copies
All Fund Total	238,999.42	48,816.14	184,089.09	-30,546.28	-57,165.84	706,426.45	299,088.21	18,028	41,346	15,517	
1301	.00	8,768.90	46,705.24	.00	.00	122,372.27	97,672.77	4,748	7,005	4,288	
130180	.00	2,555.43	12,693.06	.00	.00	3,494.80	3,127.89	235	264	136	
13018188	.00	.00	0.00	.00	.00	.00	.00				
130183	10,000.00	207.48	5,796.56	9,057.95	9,003.81	7,718.97	6,994.68	443	1,080	425	
13018388	.00	.00	0.00	.00	.00	2,252.52	2,252.52	18	18	18	
130188	.00	1,361.73	941.65	.00	.00	734.54	284.37	121	129	5	
1303	.00	938.21	7,622.06	.00	.00	17,223.29	13,762.40	794	2,983	731	
130380	.00	.00	0.00	.00	.00	134.37	78.67	4	17	4	
13038188	.00	.00	0.00	.00	.00	.00	.00				
130383	.00	18.95	316.29	.00	.00	312.91	255.56	21	135	20	
13038388	.00	.00	0.00	.00	.00	.00	.00				
130388	.00	.00	258.44	.00	.00	309.73	301.53	3	11	3	
1304	.00	755.03	3,189.41	.00	.00	9,003.05	6,998.85	393	1,538	351	
130480	.00	.00	0.00	.00	.00	16.77	16.77	1	7	1	
13048188	.00	.00	0.00	.00	.00	.00	.00				
130483	.00	266.38	3,534.08	.00	.00	5,209.66	4,598.95	309	992	294	
13048388	.00	.00	0.00	.00	.00	.00	.00				
130488	.00	.00	0.00	.00	.00	.00	.00				

4. Click  or anywhere outside the expanded panel to collapse the panel back to the Dashboard.



SirsiDynix My DirectorsStation Dashboard

Menu

SwiftLinks

General

- Manage Categories
- Manage Users
- Manage Groups
- Manage Roles
- Manage App Settings
- Manage Cube Registrations and Security
- Manage User Sessions
- Manage Logs

SwiftAnalysis All Acquisitions Measures

Measures

Fund

	Amount Budgeted	Amount Encumbered	Amount Invoiced	B
All Fund Total	238,999.42	48,816.14	184,089.09	-3
1301	.00	8,768.90	46,705.24	
130180	.00	2,555.43	12,693.06	
13018188	.00	.00	0.00	
130183	10,000.00	207.48	5,796.56	
13018388	.00	.00	0.00	
130188	.00	1,361.73	941.65	

SwiftHelp

Directors Station Training Center

- Getting started with DirectorsStation
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- Saving, printing, and emailing reports
- Using dimensions, modes, and reset
- Using the calculator
- Filtering by slice option dimensions
- Using lookup to go directly to a data member
- Filtering and sorting data columns
- Displaying titles and OPAC searches
- Creating a chart
- Creating an alert
- Creating a query

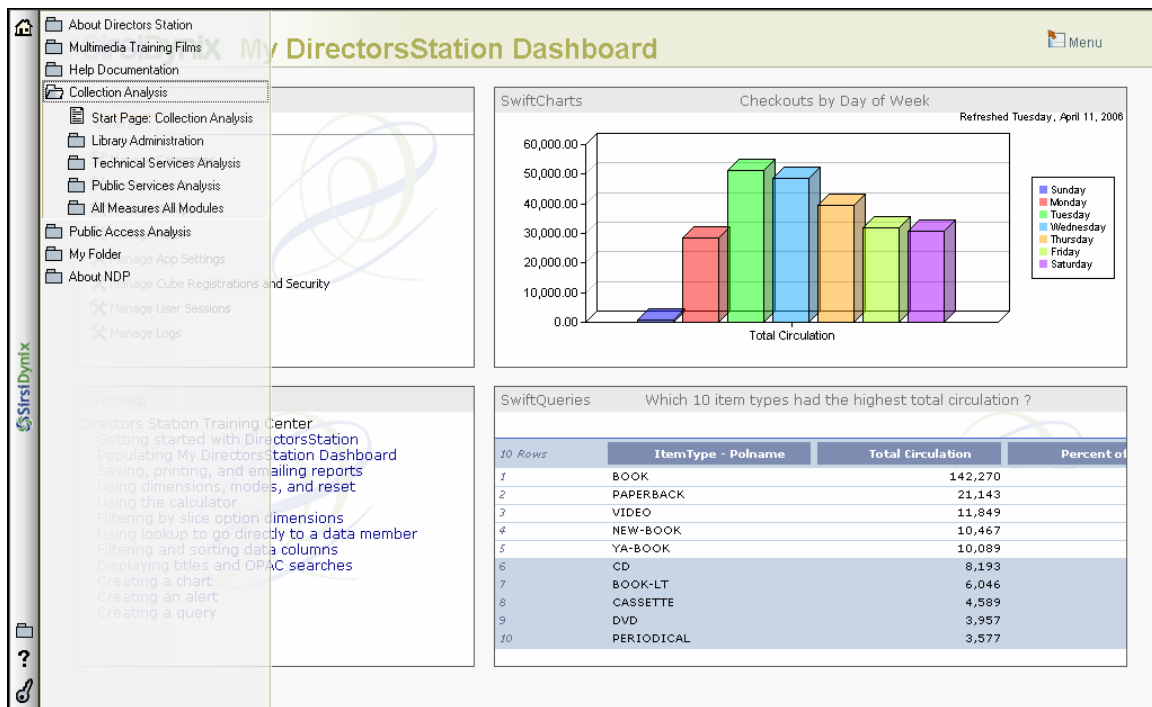
Reports

Director's Station is delivered with an All Measures report template for each Unicorn module. Use these All Measures templates to create your own custom report views.

Delivered Reports

Collection Analysis

Collection Analysis contains reports designed to access your Unicorn data.



The Unicorn modules you use determine which reports are available in Collection Analysis.

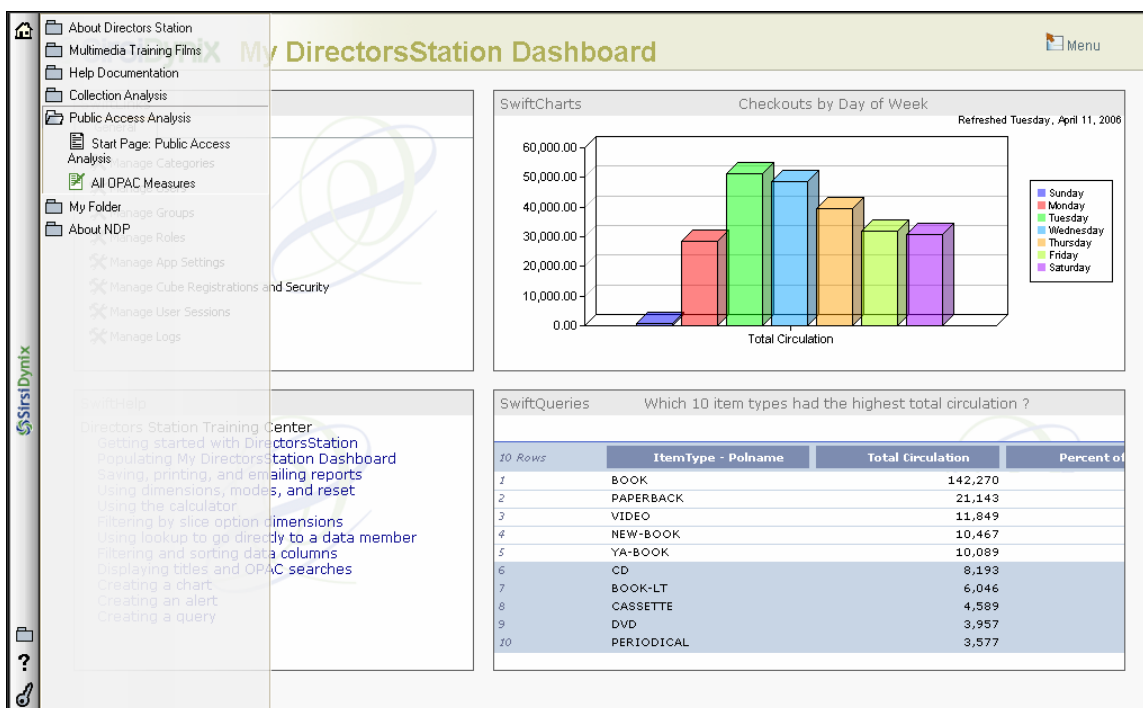
The following modules are mapped for analysis in Director's Station.

- Academic Reserves
- Acquisitions
- Authority Control
- Cataloging
- Circulation
- Materials Booking
- Requests
- Serials Control

Note The reports found in the Collection Analysis area of the Popout Menu can also be found in the SwiftAnalysis panel on the Dashboard.

Public Access Analysis

Public Access Analysis contains information about iBistro searches. In a future release, it will also contain information about other user initiated functions such as online renewals and access to online databases.



Each report is comprised of Dimensions and Measures that allow the user to customize the content of the report.

- **Dimensions** are values through which you can see your data. They are typically Unicorn policies or dates used in your records.

Dimensions →

The screenshot shows the 'All Checkouts Measures' report in the Director's Station by SirsiDynix. The interface includes a menu bar at the top with options like Menu, Save, Save As, Preview, Email, Export, Calculator, Dimensions, Modes, and Reset. Below the menu, the title 'All Checkouts Measures' is displayed, along with a refresh status 'Refreshed Tuesday, April 11, 2006' and a note 'Excluded Empty Rows and Columns'.


The 'Dimensions' section is located below the title and contains a grid of dropdown menus for selecting various filters. These include:

- User Library, Station Library, Station Login, FY Jan Dec, FY April March, FY July June
- FY Oct Sep, Hour of Day, Day of Week, ItemType, Call Number, Call Type
- Item Category 1, Item Category 2, Home Location, Current Location, Item Price, Date Title Created
- Date Copy Created, Year Published, Format, User Profile, User Category 1, User Category 2
- User Category 3, User Category 4, User Category 5, User Zipcode

Below the dimensions is a 'Measures' section with a dropdown menu. The 'Item Library' dropdown is currently selected, showing a list of libraries on the left and a table of measures on the right.

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
DATELAND	880	0.38%	829		49	2		3,976	0.22
FOOTHILLS	27,889	12.06%	26,525		1,239	125		19,183	1.45
HYDER	608	0.26%	482		126			1,761	0.35
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94
MOHAWK_MVS	2,391	1.03%	1,930		461			8,179	0.29
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

Note

To collapse the display of the dimensions, click on , located on the line separating the dimensions from the report area.

- **Measures** are numeric values that give you a count, total, average, or percentage. They can be values drawn from Unicorn that Director's Station calculates for you.

Measures

<div> <div>Menu</div> <div>Save</div> <div>Save As</div> <div>Preview</div> <div>Email</div> <div>Export</div> <div>Calculator</div> <div>Dimensions</div> <div>Modes</div> <div>Reset</div> </div> <div>Director's Station by SirsiDynix</div> <div>Refreshed Tuesday, April 11, 2006</div>									
All Checkouts Measures									
<div> <div>User Library</div> <div>Station Library</div> <div>Station Login</div> <div>FY Jan Dec</div> <div>FY April March</div> <div>FY July June</div> <div>FY Oct Sep</div> <div>Hour of Day</div> <div>Day of Week</div> <div>ItemType</div> <div>Call Number</div> <div>Call Type</div> <div>Item Category 1</div> <div>Item Category 2</div> <div>Home Location</div> <div>Current Location</div> <div>Item Price</div> <div>Date Title Created</div> <div>Date Copy Created</div> <div>Year Published</div> <div>Format</div> <div>User Profile</div> <div>User Category 1</div> <div>User Category 2</div> <div>User Category 3</div> <div>User Category 4</div> <div>User Category 5</div> <div>User Zipcode</div> </div>									
<div> <div>Measures</div> <div>Item Library</div> </div>									
	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
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DATELAND	880	0.38%	829		49	2		3,976	0.22
FOOTHILLS	27,889	12.06%	26,525		1,239	125		19,183	1.45
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SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

Creating Reports

The delivered reports can be used as-is, or they can be used as a base to create your own customized reports.

To create a report

1. From the Dashboard, click an **All Measures** report template in the **SwiftAnalysis** panel. The following window appears:

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Excluded Empty Rows and Columns

Filters:

- User Library, Station Library, Station Login, FY Jan Dec, FY April March, FY July June
- FY Oct Sep, Hour of Day, Day of Week, ItemType, Call Number, Call Type
- Item Category 1, Item Category 2, Home Location, Current Location, Item Price, Date Title Created
- Date Copy Created, Year Published, Format, User Profile, User Category 1, User Category 2
- User Category 3, User Category 4, User Category 5, User Zipcode

Measures:

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
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UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

2. Hover over the dimension until you see a four-armed cursor.

3. Click and drag the dimension you want to display to the report area.
4. Position the new dimension over the existing dimension, so that the box containing **Swap** appears.

5. Release the new dimension. It will replace the existing dimension in the report area. The old dimension is moved back to the dimensions area.

Director's Station by SirsiDynix

Refreshed Tuesday, April 11, 2006

All Checkouts Measures

Excluded Empty Rows and Columns

Item Library User Library Station Library Station Login FY Jan Dec FY April March
FY July June FY Oct Sep Day of Week ItemType Call Number Call Type
Item Category 1 Item Category 2 Home Location Current Location Item Price Date Title Created
Date Copy Created Year Published Format User Profile User Category 1 User Category 2
User Category 3 User Category 4 User Category 5 User Zipcode

Measures

Hour of Day

	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Hour of Day	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61

6. Click the down arrow to see the dimension list.

Director's Station by SirsiDynix

Refreshed Tuesday, April 11, 2006

All Checkouts Measures

Excluded Empty Rows and Columns

Item Library User Library Station Library Station Login FY Jan Dec FY April March
FY July June FY Oct Sep Day of Week ItemType Call Number Call Type
Item Category 1 Item Category 2 Home Location Current Location Item Price Date Title Created
Date Copy Created Year Published Format User Profile User Category 1 User Category 2
User Category 3 User Category 4 User Category 5 User Zipcode

Measures

Hour of Day

Hour of Day

✓ Accept X Cancel

	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
✓ All Hour of Day			210,631	2,046	14,325	4,260	1	376,106	0.61

0
1
2
3
4
5
6
7
8
9
10
11
12
13

9. To exclude the total line in the report area, click on the dimension's down arrow and deselect the check box next to All (in this case, All Hour of Day).

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Excluded Empty Rows and Columns

Item Library User Library Station Library Station Login FY Jan Dec FY April March
 FY July June FY Oct Sep Day of Week ItemType Call Number Call Type
 Item Category 1 Item Category 2 Home Location Current Location Item Price Date Title Created
 Date Copy Created Year Published Format User Profile User Category 1 User Category 2
 User Category 3 User Category 4 User Category 5 User Zipcode

Measures

Hour of Day

Hour of Day

Accept Cancel

Hour of Day	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Hour of Day	210,631		2,046	14,325	4,260	1	376,106	0.61	

10. Select the check boxes of the data you would like to view and click **Accept**. The new report appears, without the total line.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Excluded Empty Rows and Columns

Item Library User Library Station Library Station Login FY Jan Dec FY April March
 FY July June FY Oct Sep Day of Week ItemType Call Number Call Type
 Item Category 1 Item Category 2 Home Location Current Location Item Price Date Title Created
 Date Copy Created Year Published Format User Profile User Category 1 User Category 2
 User Category 3 User Category 4 User Category 5 User Zipcode

Measures

Hour of Day

Hour of Day

Accept Cancel

Hour of Day	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals
6	210	100.00%	172		4	34
7	1,197	570.00%	1,037		12	148
8	2,880	1371.43%	2,105	106	386	283
9	14,763	7030.00%	13,143	164	1,158	298

To include more than one dimension in a report

1. Hover over a dimension in the dimension pool until you see a four-arrowed cursor.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Excluded Empty Rows and Columns

Item Library User Library Station Library Station Login FY Jan Dec FY April March
 FY July June FY Oct Sep Day of Week ItemType Call Number Call Type
 Item Category 1 Item Category 2 Home Location Current Location Item Price Date Title Created
 Date Copy Created Year Published Format User Profile User Category 1 User Category 2
 User Category 3 User Category 4 User Category 5 User Zipcode

Measures

Hour of Day	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals
6	210	100.00%	172		4	34
7	1,197	570.00%	1,037		12	148
8	2,880	1371.43%	2,105	106	386	283
9	14,763	7030.00%	13,143	164	1,158	298

2. Click and drag the dimension you want to display to the report area.

- Position the new dimension over the existing dimension, so that the box containing **Insert Above** or **Insert Below** appears.

Director's Station by SirsiDynix

Refreshed Tuesday, April 11, 2006

All Checkouts Measures

Excluded Empty Rows and Columns

Item Library User Library Station Library Station Login FY Jan Dec FY April March
 FY July June FY Oct Sep ItemType Call Number Call Type
 Item Category 1 Item Category 2 Home Location Current Location Item Price Date Title Created
 Date Copy Created Year Published Format User Profile User Category 1 User Category 2
 User Category 3 User Category 4 User Category 5 User Zipcode

Measures

Day of Week
 hour of day
 Insert Above

	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals
6	210	100.00%	172		4	34
7	1,197	570.00%	1,037		12	148
8	2,880	1371.43%	2,105	106	386	283
9	14,763	7030.00%	13,143	164	1,158	298

Director's Station by SirsiDynix

Refreshed Tuesday, April 11, 2006

All Checkouts Measures

Excluded Empty Rows and Columns

Item Library User Library Station Library Station Login FY Jan Dec FY April March
 FY July June FY Oct Sep ItemType Call Number Call Type
 Item Category 1 Item Category 2 Home Location Current Location Item Price Date Title Created
 Date Copy Created Year Published Format User Profile User Category 1 User Category 2
 User Category 3 User Category 4 User Category 5 User Zipcode

Measures

Day of Week
 hour of day
 Insert Below

	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals
6	210	100.00%	172		4	34
7	1,197	570.00%	1,037		12	148
8	2,880	1371.43%	2,105	106	386	283
9	14,763	7030.00%	13,143	164	1,158	298

- Release the new dimension and it appears with the original dimension, above or below as you indicated.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Excluded Empty Rows and Columns

Item Library User Library Station Library Station Login FY Jan Dec FY April March
 FY July June FY Oct Sep ItemType Call Number Call Type Item Category 1
 Item Category 2 Home Location Current Location Item Price Date Title Created Date Copy Created
 Year Published Format User Profile User Category 1 User Category 2 User Category 3
 User Category 4 User Category 5 User Zipcode

Day of Week Measures
 Hour of Day

	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals
All Day of Week						
6	210	100.00%	172		4	34
7	1,197	100.00%	1,037		12	148
8	2,880	100.00%	2,105	106	386	283
9	14,763	100.00%	13,143	164	1,158	298

- Make any necessary changes to the new dimension as explained above. The new report appears.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Excluded Empty Rows and Columns

Item Library User Library Station Library Station Login FY Jan Dec FY April March
 FY July June FY Oct Sep ItemType Call Number Call Type Item Category 1
 Item Category 2 Home Location Current Location Item Price Date Title Created Date Copy Created
 Year Published Format User Profile User Category 1 User Category 2 User Category 3
 User Category 4 User Category 5 User Zipcode

Day of Week Measures
 Hour of Day

	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals
Tuesday						
6	63	100.00%	53			10
7	133	100.00%	111		5	17
8	687	100.00%	506	20	79	82
9	3,403	100.00%	2,906	40	427	30
Thursday						
6	14	22.22%	4			10
7	264	198.50%	243		3	18
8	1,007	146.58%	818	14	162	13
9	2,803	82.37%	2,504	29	218	52

To limit a dimension in the dimension pool

Another way to further customize your report is to filter a dimension in the dimension pool.

1. To filter a dimension, click the down arrow next to a dimension. While in the pool, the default is set to look at all dimensions.

Director's Station by SirsiDynix

Refreshed Tuesday, April 11, 2006

Excluded Empty Rows and Columns

All Checkouts Measures

Item Library User Library Station Library Station Login FY Jan Dec FY April March
 FY July June FY Oct Sep ItemType Call Number Call Type Item Category 1
 Item Category 2 Home Location Date Title Created Date Copy Created
 Year Published Format User Category 2 User Category 3
 User Category 4 User Category 5

Day of Week

Hour of Day

Measures

	Total Circulation	Percent Circulation
Tuesday		
6	63	100.
7	133	100.
8	687	100.
9	3,403	100.
Thursday		
6	14	22.
7	264	198.
8	1,007	146.58%
9	2,803	82.37%

ItemType

- All ItemType
- ART-PRINT
- AUDIOBOOK
- AV
- AV_CASS
- AV_DISC
- BESTSELLER
- BIGBOOKS
- BOOK
- BOOK-LT
- BOOK-SP
- CASSETTE
- CD
- CD_SPOKEN
- DEVICE

2. Select one of the dimensions in the list and click **Accept**. The new filtered dimension appears in the pool.

Director's Station by SirsiDynix

Menu Save Save As Preview Email Export Calculator Dimensions Modes Reset Refreshed Tuesday, April 11, 2006

All Checkouts Measures
BOOK / All ItemType Excluded Empty Rows and Columns

ItemType: BOOK / All ItemType

Item Library: User Library: Station Library: Station Login:

FY Jan Dec: FY April March: FY July June: FY Oct Sep: Call Number: Call Type:

Item Category 1: Item Category 2: Home Location: Current Location: Item Price: Date Title Created:

Date Copy Created: Year Published: Format: User Profile: User Category 1: User Category 2:

User Category 3: User Category 4: User Category 5: User Zipcode:

Day of Week: Hour of Day:

Measures:

	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals
Tuesday						
6	54	100.00%	44			10
7	59	100.00%	46		5	8
8	388	100.00%	250	5	58	75
9	1,928	100.00%	1,593	19	293	23
Thursday						
6	3	5.56%	2			1
7	173	293.22%	158		2	13
8	352	90.72%	246	7	92	7
9	1,600	82.99%	1,386	17	165	32

Note The only choice you have when changing values of dimensions in the dimension pool is one or all. In order to select more than one value, you must drag and drop that dimension into the report area as explained above.

Title Lists in Reports

An embedded feature of Director's Station allows you to display a list of titles that are associated with the values in the cells selected. These lists are only available in the Cataloging, Circulation, and Acquisitions cubes, as follows.

- In the Acquisitions report, you can retrieve a list of funded titles.
- In the Cataloging report, you can retrieve a list of copies most checked out and least checked out.
- And in the Circulation report, you can retrieve a list of titles with the most checkouts, the fewest checkouts, and the most holds.

List Titles with the Most Checkouts

To create a title list

1. From the Dashboard, click an existing report. You can use a delivered report or one that you have created.
2. Highlight one or more data cells by positioning your cursor at the upper left corner of the cell at the beginning of your selection and dragging it to the lower right corner of the cell at the end of your selection.
3. After highlighting the cell(s), the **Select** menu appears.

Director's Station by SirsiDynix

Refreshed Tuesday, April 11, 2006

All Checkouts Measures

Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
DATLAND	880	0.38%	829		49	2		3,976	0.22
FOOTHILLS	27,889	12.06%	26,525		1,239	125		19,183	1.45
HYDER	608	0.26%	482		126			1,761	0.35
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94
MOHAWK_MVS	2,391	1.03%	1,930		461			8,179	0.25
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

Select menu options:

- Create an Alert
- Chart Selection
- List Titles with the Most Checkouts
- List Titles with the Least Checkouts

- Click the **List Titles with the Most Checkouts** selection.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
DATELAND	880	0.38%	829		49	2		3,976	0.2
FOOTHILLS	27,889	12.06%	26,525		1,239	125		19,183	1.4
HYDER	608	0.26%	482		126			1,761	0.3
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.9
MOHAWK_MVS	2,391	1.03%	1,930		461			8,179	0.2
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.2
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.7
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.4
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

Context Menu:

- Create an Alert
- Chart Selection
- List Titles with the Most Checkouts
- List Titles with the Least Checkouts

- The formatted list of titles with the most checkouts opens in a new window.

Note The title lists take more time loading if you have selected cells with large values. Only one thousand titles are displayed in this format.

Sorting in Reports

If you are looking for specific values within the measures of your report, you can filter a column or sort it by ascending or descending values.

To filter values in columns of a report

- From the Dashboard, click an existing report. You can use a delivered report or one that you have created.

- Click in an empty space next to the column title. The select menu appears.

Director's Station by SirsiDynix
Refreshed Tuesday, April 11, 2006

All Checkouts Measures
Filtered
Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,211	1	1,376,106	0.61
ACADEMIC	11,940	5.16%	9,116	2,042	642	1			
DATLAND	880	0.38%	829		49				
FOOTHILLS	27,889	12.06%	26,525		1,239	1			
HYDER	608	0.26%	482		126				
MAIN	148,212	64.09%	135,602	4	8,717	3,8			
MOHAWK_MVS	2,391	1.03%	1,930		461				
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

- Click **Filter on Value**. The **Value Filter** dialog appears.

Value Filter

Filter By:

Patron Renewals

Where:

☐ Equal To
☐ Less Than
☐ Greater Than
☐ Between
☐ Outer

Accept Cancel

- Click the button next to the value by which you would like to sort the column and enter the numerical amount.

Value Filter

Filter By:

Patron Renewals

Where:

☐ Equal To
☐ Less Than
☒ Greater Than
☐ Between
☐ Outer

Accept Cancel

- Click **Accept**. The new report appears.

Menu Save Save As Preview Email Export Calculator Dimensions Modes Reset

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Filtered Excluded Empty Rows and Columns

User Library Station Library Station Login FY Jan Dec FY April March FY July June
 FY Oct Sep Hour of Day Day of Week ItemType Call Number Call Type
 Item Category 1 Item Category 2 Home Location Current Location Item Price Date Title Created
 Date Copy Created Year Published Format User Profile User Category 1 User Category 2
 User Category 3 User Category 4 User Category 5 User Zipcode

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94

To view or change filter values

1. If you need to go back to the report and view how the report has been filtered or change the value of the filter, click on **Menu**.

Refreshed Tuesday, April 11, 2006

Filtered
Excluded Empty Rows and Columns

Station Library Station Login FY Jan Dec FY April March FY July June

Hour of Day Day of Week ItemType Call Number Call Type

Item Category 2 Home Location Current Location Item Price Date Title Created

Year Published Format User Profile User Category 1 User Category 2

User Category 4 User Category 5 User Zipcode

Measures

Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94

2. Mouse over **Value Filters**. The columns that have been sorted appear.

Refreshed Tuesday, April 11, 2006

Filtered
Excluded Empty Rows and Columns

Station Library Station Login FY Jan Dec FY April March FY July June

Hour of Day Day of Week ItemType Call Number Call Type

Item Category 2 Home Location Current Location Item Price Date Title Created

Year Published Format User Profile User Category 1 User Category 2

User Category 4 User Category 5 User Zipcode

Measures

Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
Total Circulation...			4	8,717	3,889		157,098	0.94
Patron Renewals...								

3. Click the column that has been sorted and the **Value Filter** window appears, as before.
4. Change the value and click **Accept**. The report data reflects those changes.

To sort values within a column

1. From the Dashboard, click an existing report. You can use a delivered report or one that you have created.
2. Click in an empty space next to the column title.

3. Click Sort Column Ascending or Sort Column Descending, as desired.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Filtered Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
DATELAND	880	0.38%	829		49	2		3,976	0.22
FOOTHILLS	27,889	12.06%	26,525		1,239	125		19,183	1.45
HYDER	608	0.26%	482		126			1,761	0.35
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94
MOHAWK_MVS	2,391	1.03%	1,930		461			8,179	0.29
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

4. The new report appears with the column sorted as specified.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Filtered and Sorted Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
HYDER	608	0.26%	482		126			1,761	0.35
MOHAWK_MVS	2,391	1.03%	1,930		461			8,179	0.29
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
UNDEFINED	1,015	0.44%	914		100	1			
DATELAND	880	0.38%	829		49	2		3,976	0.22
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
FOOTHILLS	27,889	12.06%	26,525		1,239	125		19,183	1.45
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94

5. To remove the column sort, click in the empty space of the column title again.
6. Click **Remove Column Sort**.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Filtered and Sorted Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
HYDER	608	0.26%	482		126			1,761	0.35
MOHAWK_MVS	2,391	1.03%	1,930		461			8,179	0.29
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
UNDEFINED	1,015	0.44%	914		100				
DATLAND	880	0.38%	829		49			3,976	0.22
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
FOOTHILLS	27,889	12.06%	26,525		1,239	125		19,183	1.45
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94

7. The report returns to its original appearance.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Filtered Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
DATLAND	880	0.38%	829		49	2		3,976	0.22
FOOTHILLS	27,889	12.06%	26,525		1,239	125		19,183	1.45
HYDER	608	0.26%	482		126			1,761	0.35
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94
MOHAWK_MVS	2,391	1.03%	1,930		461			8,179	0.29
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

Lookup in Reports

Another embedded feature in Director's Station is Lookup. Lookup is useful when you have a lot of information and you want to find specific information.

To use lookup in reports

1. From the Dashboard, click an existing report. You can use a delivered report or one that you have created.
2. Click next to the text of the dimension.

Director's Station by SirsiDynix

Refreshed Tuesday, April 11, 2006

All Checkouts Measures

Filtered
Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
DATELAND			29		49	2		3,976	0.22
FOOTHILLS			25		1,239	125		19,183	1.45
HYDER			82		126			1,761	0.35
MAIN			02	4	8,717	3,889		157,098	0.94
MOHAWK_MVS			30		461			8,179	0.29
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

3. Type in a letter or a term.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
DATLAND			29		49	2		3,976	0.22
FOOTHILLS			25		1,239	125		19,183	1.45
HYDER			82		126			1,761	0.35
MAIN			02	4	8,717	3,889		157,098	0.94
MOHAWK_MVS			30		461			8,179	0.29
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

4. Click . The new report appears.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Filtered Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94
MOHAWK_MVS	2,391	1.03%	1,930		461			8,179	0.29

5. To return to the report and remove the lookup, click next to the text of the dimension, as before.

6. Click **Remove Lookup**.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006

All Checkouts Measures Filtered Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94
MOHAWK_MVS			930		461			8,179	0.29

Lookup:

Remove Lookup

7. The report returns to the original appearance.

Director's Station by SirsiDynix Refreshed Tuesday, April 11, 2006










All Checkouts Measures Excluded Empty Rows and Columns

Measures

Item Library	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
DATLAND	880	0.38%	829		49	2		3,976	0.22
FOOTHILLS	27,889	12.06%	26,525		1,239	125		19,183	1.45
HYDER	608	0.26%	482		126			1,761	0.35
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94
MOHAWK_MVS	2,391	1.03%	1,930		461			8,179	0.29
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

Reports Toolbar

When working within a report, a toolbar displays that may be used to manage your customized report.

Icon	Description
	Save – Allows you to save modifications to a report in My Folder and/or your Dashboard.
	Save As – Allows you to save the report to My Folder and/or your Dashboard.
	Preview – Allows you to see a print preview of the report, change attributes such as paper size and layout, and print the report.
	Email – Allows you to email a report link to another user. The person wishing to view the report must have a Director's Station login.
	Export – Allows you to export or download the data currently being viewed as a Comma Separated Value (.csv) file. This file format may be opened in various spreadsheet and database applications.
	Calculator – Allows you to create new measures on-the-fly to provide additional information in a report view.
	Dimensions – Allows you to add or remove dimensions from the available list in the Slice Options area.
	Modes – Allows you to change global attributes to the report view.
	Reset – Allows you to discard all changes and reset the report to its original state.


These same icons can be accessed through the Menu at the top left of the report.

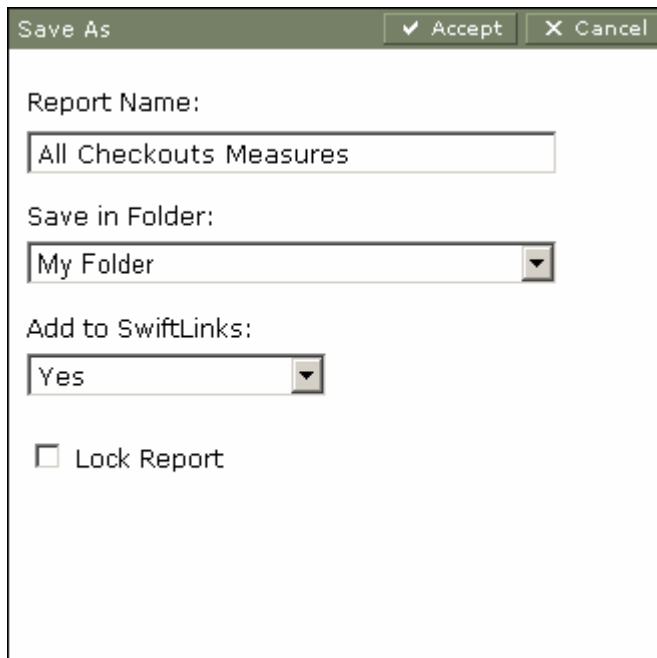
The screenshot displays the FirstDynix report interface. On the left, a vertical menu bar contains icons for various functions. A dropdown menu is open, listing the following options: How do I..., Save, Save As..., Preview..., Email..., Export..., Calculator..., Dimensions..., Modes..., Reset, Lookup Filters, and Value Filters. The main report area features a header with the text 'Refreshed Tuesday, April 11, 2006' and 'Excluded Empty Rows and Columns'. Below the header is a grid of filter buttons including Station Library, Station Login, FY Jan Dec, FY April March, FY July June, Hour of Day, Day of Week, ItemType, Call Number, Call Type, Item Category 2, Home Location, Current Location, Item Price, Date Title Created, Year Published, Format, User Profile, User Category 1, User Category 2, User Category 4, User Category 5, and User Zipcode. A 'Measures' dropdown is also present. The data table below has columns for Total Circulation, Percent of Circulation, Checkout Item, Checkout Reserve, Staff Renewals, Patron Renewals, Reserve Renewals, Total Copies, and Turnover Rate. The table lists data for various locations: FOOTHILLS, HYDER, MAIN, MOHAWK_MVS, ROLL_MVS, SANLUIS, SOMERTON, UNDEFINED, and WELLTON.

	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61	
11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11	
880	0.38%	829		49	2		3,976	0.22	
27,889	12.06%	26,525		1,239	125		19,183	1.45	
608	0.26%	482		126			1,761	0.35	
148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94	
2,391	1.03%	1,930		461			8,179	0.29	
1,368	0.59%	1,204		164			5,748	0.24	
16,064	6.95%	15,165		847	52		22,447	0.72	
9,816	4.24%	9,440		342	34		21,047	0.47	
1,015	0.44%	914		100	1				
11,080	4.79%	9,424		1,638	18		26,470	0.42	

Saving Reports

To save a report

1. Once you have created a new report, click  **Save As** on the toolbar or **Save As** in the menu. The **Save As** dialog appears.



The **Save As** dialog box is shown with the following fields and options:

- Report Name:** A text input field containing "All Checkouts Measures".
- Save in Folder:** A dropdown menu showing "My Folder".
- Add to SwiftLinks:** A dropdown menu showing "Yes".
- ☐ **Lock Report**

Buttons at the top right: **Accept** (with a checkmark icon) and **Cancel** (with an X icon).


2. Enter a new **Report Name**.
3. Accept **My Folder** as the default selection for **Save In Folder**.
4. Choose **Yes** for **Add to SwiftLinks** if you want the new report to appear on your Dashboard under SwiftAnalysis.

Note	A report can be removed from SwiftAnalysis by clicking on the report in the panel and clicking Remove once the report name is highlighted.
-------------	--





5. Select **Lock Report** to prevent changes to this saved report.
6. When finished, click **Accept** to save the report.


Printing Reports

To print a report

1. View or create a report, and click  **Preview** on the toolbar or **Preview** in the Menu. The **Print Preview** window appears:


SwiftAnalysis Print Preview - Microsoft Internet Explorer

 Director's Station by SirsiDynix page 1 of 1 Refreshed Tuesday, April 11, 2006

All Checkouts Measures Excluded Empty Rows and Columns

Item Library	Measures								
	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reserve	Staff Renewals	Patron Renewals	Reserve Renewals	Total Copies	Turnover Rate
All Item Library Total	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
ACADEMIC	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
DATLAND	880	0.38%	829		49	2		3,976	0.22
FOOTHILLS	27,889	12.06%	26,525		1,239	125		19,183	1.45
HYDER	608	0.26%	482		126			1,761	0.35
MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94
MOHAWK_MVS	2,391	1.03%	1,930		461			8,179	0.29
ROLL_MVS	1,368	0.59%	1,204		164			5,748	0.24
SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
UNDEFINED	1,015	0.44%	914		100	1			
WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42

2. Click  **Paper** to adjust the paper size and orientation.


Paper Options ✓ Accept X Cancel

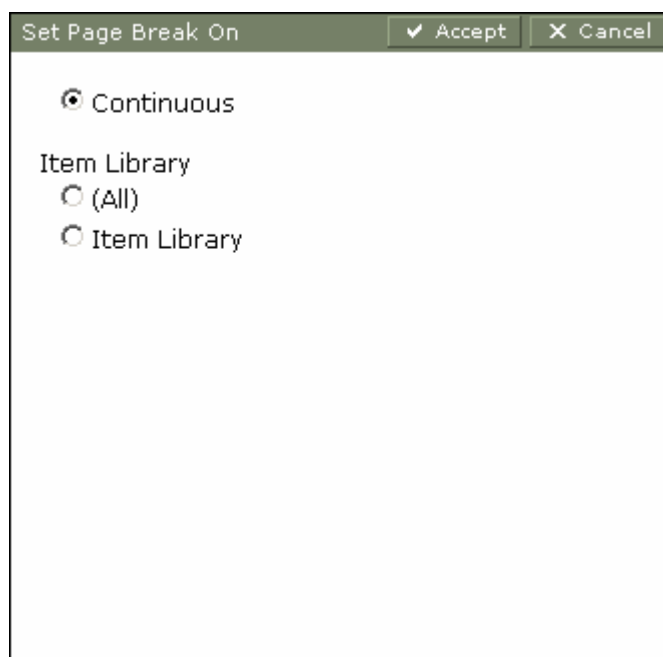
Orientation:


☐ Portrait ☒ Landscape

Size:

Letter (8 1/2 x 11 inch) ▼


3. Click  **Break** to adjust where page breaks will occur.



4. When finished making adjustments, click  **Print** to print the finished report.

E-mailing Reports


To e-mail a report

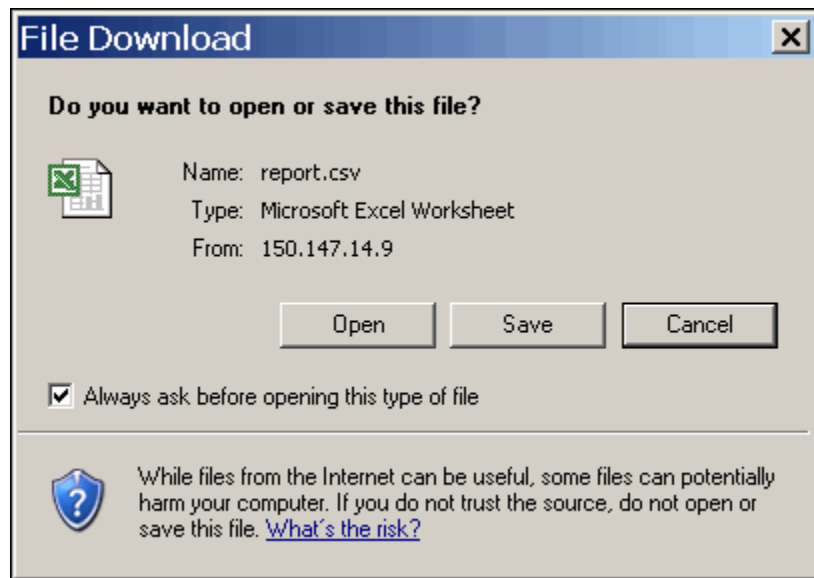
1. View or create a report, and click  **Email** on the toolbar or **Email** in the Menu.
2. Director's Station opens a new message, containing the URL of the new report, in the default e-mail application on your workstation.

Note	Any user accessing this report through the e-mailed link must have a Director's Station login and password.
-------------	---

Exporting Reports

To export a report

1. View or create a report, and click  **Export** on the toolbar or **Export** in the Menu. The report will be exported as a .csv file into the default spreadsheet application on your workstation. The following window may appear.



2. Click **Open** to view the exported report:

Microsoft Excel - report[1].csv

File Edit View Insert Format Tools Data RoboPDF Window Help Adobe PDF

File Edit View Insert Format Tools Data RoboPDF Window Help Adobe PDF

Reply with Changes... End Review...

A1 All Checkouts Measures


	A	B	C	D	E	F	G	H	I	J
1	All Checkouts Measures									
2										
3	Refreshed Tuesday, April 11, 2006									
4	Measures									
5	Item Library	Total Circulation	Percent of Checkout	Checkout	Staff Renewal	Patron Renewal	Reserve	Total Copies	Turnover Rate	
6	All Item Lit	231,263	100.00%	210,631	2,046	14,325	4,260	1	376,106	0.61
7	ACADEMI	11,940	5.16%	9,116	2,042	642	139	1	110,139	0.11
8	DATELANI	880	0.38%	829		49	2		3,976	0.22
9	FOOTHILL	27,889	12.06%	26,525		1,239	125		19,183	1.45
10	HYDER	608	0.26%	482		126			1,761	0.35
11	MAIN	148,212	64.09%	135,602	4	8,717	3,889		157,098	0.94
12	MOHAWK	2,391	1.03%	1,930		461			8,179	0.29
13	ROLL_MV	1,368	0.59%	1,204		164			5,748	0.24
14	SANLUIS	16,064	6.95%	15,165		847	52		22,447	0.72
15	SOMERTON	9,816	4.24%	9,440		342	34		21,047	0.47
16	UNDEFINE	1,015	0.44%	914		100	1			
17	WELLTON	11,080	4.79%	9,424		1,638	18		26,470	0.42
18										

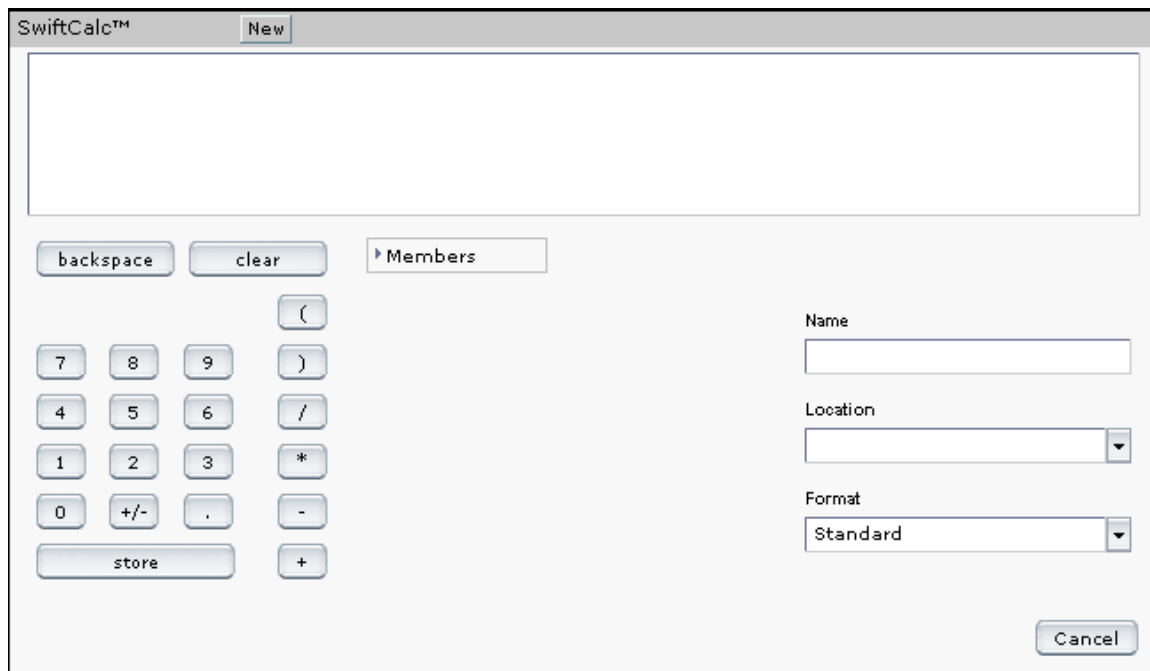
Ready

Calculator

Use the Calculator to achieve more detailed results based on calculations of individual fields.

To use the calculator

1. View or create a report, and click  on the toolbar or **Calculator** in the Menu. The **SwiftCalc** dialog appears.



The SwiftCalc™ dialog box is shown with a 'New' tab. It features a large empty text area at the top. Below this are buttons for 'backspace', 'clear', and a 'Members' button with a right-pointing arrow. A numeric keypad is located on the left, including buttons for digits 0-9, '+/-', '.', '+', '(', ')', '/', '*', and a 'store' button. On the right side, there are three input fields: 'Name' (a text box), 'Location' (a dropdown menu), and 'Format' (a dropdown menu currently set to 'Standard'). A 'Cancel' button is positioned at the bottom right.

2. Click **New**. A list appears with the report's dimensions and measures:

SwiftCalc™

New

- ☐ Measures
- ☐ Payment Type
- ☐ Payment Date
- ☐ Library
- ☐ ItemType
- ☐ Call Number
- ☐ Call Type
- ☐ Item Category 1
- ☐ Item Category 2
- ☐ Bill Reason
- ☐ User Category 1
- ☐ User Category 2
- ☐ User Category 3

backspace

7 8 9

4 5 6

1 2 3

0 +/- . -

store +

Name

Location

Format

Standard

Cancel

3. Select a dimension or measure. A new list window appears:

SwiftCalc™

New

backspace clear

()

7 8 9

4 5 6

1 2 3

0 +/- . -

store +

▼Members

- ☒ All Payment Type
 - ☐ CANCEL
 - ☐ CASH
 - ☐ CHECK
 - ☐ CREDITCARD
 - ☐ FORGIVEN
 - ☐ GOODS
 - ☐ UNDEFINED
 - ☐ VOLUNTEER

Name

Location

Payment Type

Format

Standard

Save Cancel

- Enter the equation using the lists provided and the calculator functions.

SwiftCalc™ New

(CASH) + (CHECK)

backspace clear

()

7 8 9

4 5 6

1 2 3

0 +/- . -

store +

▼ Members

☐ All Payment Type

☐ CANCEL

☐ CASH

☒ CHECK

☐ CREDITCARD

☐ FORGIVEN

☐ GOODS

☐ UNDEFINED

☐ VOLUNTEER

Name

Noncredit Payments

Location

All Payment Type / Payment

Format

Standard

Save Cancel

- Click **Save**. The new Dimension or Measure will appear in the report:

Director's Station by SirsiDynix

Refreshed Thursday, April 27, 2006

All Bill Measures

Excluded Empty Rows and Columns

Payment Date Library ItemType Call Number Call Type Item Category 1

Item Category 2 Bill Reason User Category 1 User Category 2 User Category 3 User Category 4

User Category 5 User Profile Item Price Date Billed Birth Year User Zipcode

Measures

Payment Type

	Number of Bills	Total Amount Billed	Payment Amounts	Delinquent Patrons	Blocked Patrons	Barred Patrons
All Payment Type Total	63,779	274,465.36	60,595.71	13,348	10,989	5,111
CANCEL			30,802.16			
CASH			20,054.42			
CHECK			5,917.71			
CREDITCARD			40.15			
FORGIVEN			3,641.77			
GOODS			139.50			
Noncredit Payments			25,972.13			

Note The values created by the calculator do not appear in any report other than the one in which they were created.

Managing Dimensions

Use filters to add or remove dimensions from the available list in the Slice Options area.

To manage dimensions

1. View or create a report in Director's Station.


Director's Station by SirsiDynix Refreshed Thursday, April 27, 2006

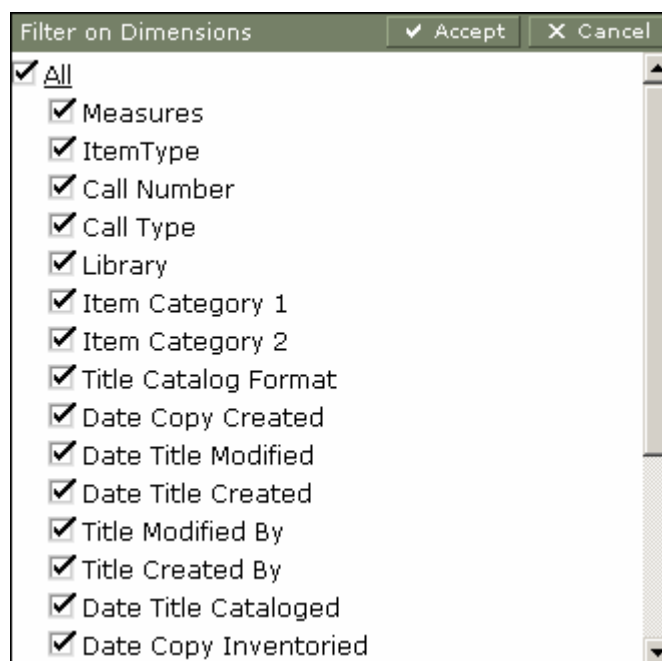
All Catalog Measures Excluded Empty Rows and Columns

Call Number Call Type Library Item Category 1 Item Category 2 Title Catalog Format
 Date Copy Created Date Title Modified Date Title Created Title Modified By Title Created By Date Title Cataloged
 Date Copy Inventoried Copy Reserve Status Current Location Home Location Items Price Date Last Checked Out
 Year Published Language of Title Country of Pub

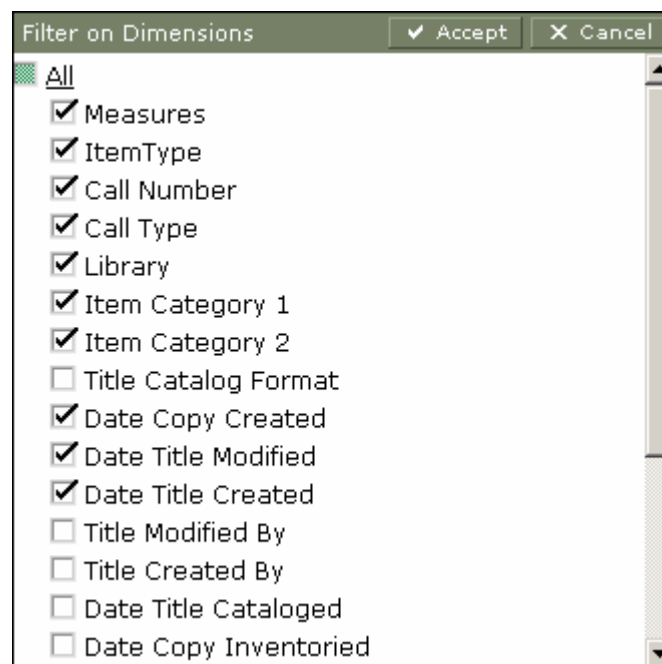
Measures

ItemType	Total Titles	Total Call Numbers	Total Copies	% of Copies to Titles	% of Copies to Call Numbers	% of Call Numbers to Titles	% of Titles to Total Titles	Total Collection Value
All ItemType Total	223,224	320,758	351,592	157.51%	109.61%	143.69%	100.00%	7,809,908.72
ATLAS	7	9	9	128.57%	100.00%	128.57%	0.00%	217.02
AUDIOBOOK	150	164	167	111.33%	101.83%	109.33%	0.07%	3,968.94
AV	8	8	8	100.00%	100.00%	100.00%	0.00%	364.99
AV_CASS	120	126	134	111.67%	106.35%	105.00%	0.05%	881.03
AV_DISC	7	21	21	300.00%	100.00%	300.00%	0.00%	283.94
AV_FILM	1	1	1	100.00%	100.00%	100.00%	0.00%	35.00
AV_SLIDE	12	12	15	125.00%	125.00%	100.00%	0.01%	1,406.15
BESTSELLER	113	113	116	102.65%	102.65%	100.00%	0.05%	2,592.24
BIGBOOKS	22	22	22	100.00%	100.00%	100.00%	0.01%	444.75
BOOK	163,996	236,087	258,394	157.56%	109.45%	143.96%	73.47%	5,340,041.97
BOOK-LT	1,529	1,590	1,831	119.75%	115.16%	103.99%	0.68%	52,122.04
BOOK-SP	666	1,375	1,529	229.58%	111.20%	206.46%	0.30%	26,404.08
CASSETTE	2,715	4,158	4,381	161.36%	105.36%	153.15%	1.22%	111,998.50
CD	2,251	3,380	3,502	155.58%	103.61%	150.16%	1.01%	91,178.05
CD_SPOKEN	22	24	24	109.09%	100.00%	109.09%	0.01%	1,021.18

2. Click  on the toolbar or **Dimensions** in the Menu. The **Filter on Dimensions** dialog appears.



3. By default **All** filters are selected. You may clear check boxes for filters you do not want to appear.



4. Click **Accept**. The report updates with the appropriate dimensions removed.

Menu Save Save As Preview Email Export Calculator Dimensions Modes Reset Refreshed Tuesday, April 18, 2006

Directors Station by SirsiDynix Excluded Empty Rows and Columns

All Catalog Measures

Call Number Call Type Library Item Category 1 Item Category 2 Year Published
 Date Copy Created Date Title Modified Date Title Created Copy Reserve Status Current Location Home Location
 Items Price

Item Type

	Total Titles	Total Call Numbers	Total Copies	% of Copies to Titles	% of Copies to Call Numbers	% of Call Numbers to Titles	% of Titles to Total Titles	Total Collection Value
All ItemType Total	50,580	51,592	67,983	134.41%	131.77%	102.00%	100.00%	104,115,309.94
ART-PRINT	8	8	9	112.50%	112.50%	100.00%	0.02%	3,040.00
ATLAS	14	14	106	757.14%	757.14%	100.00%	0.03%	373,914.00
AUDIOBOOK	606	607	607	100.17%	100.00%	100.17%	1.20%	5,050.00
AV	3,700	3,721	4,365	117.97%	117.31%	100.57%	7.32%	17,525,301.40
BESTSELLER	116	143	162	139.66%	113.29%	123.28%	0.23%	137.95
BOOK	43,720	44,548	57,307	131.08%	128.64%	101.89%	86.44%	49,310,264.65
CD	7	7	7	100.00%	100.00%	100.00%	0.01%	3,034.00
EQUIPMENT	34	36	47	138.24%	130.56%	105.88%	0.07%	3,807.00
FILMSTRIP	1	1	1	100.00%	100.00%	100.00%	0.00%	0.00
KIT	9	10	35	388.89%	350.00%	111.11%	0.02%	2,895.01
LASERDISC	5	5	5	100.00%	100.00%	100.00%	0.01%	0.00
MAGAZINE	40	58	68	170.00%	117.24%	145.00%	0.08%	5,130.97
MAP	1	1	1	100.00%	100.00%	100.00%	0.00%	0.00
MICROFORM	14	18	22	157.14%	122.22%	128.57%	0.03%	2,875.00
NEW-AV	1	1	1	100.00%	100.00%	100.00%	0.00%	0.00
NEW-BOOK	15	16	17	113.33%	106.25%	106.67%	0.03%	13,311.94


Modes

Use Modes to change global attributes to the report view. The default settings are configured to optimize the results of the report.

To change modes

1. View or create a report in Director's Station.

Item Type	Total Titles	Total Call Numbers	Total Copies	% of Copies to Titles	% of Copies to Call Numbers	% of Call Numbers to Titles	% of Titles to Total Titles	Total Collection Value
All ItemType Total	50,580	51,592	67,983	134.41%	131.77%	102.00%	100.00%	104,115,309.94
ART-PRINT	8	8	9	112.50%	112.50%	100.00%	0.02%	3,040.00
ATLAS	14	14	106	757.14%	757.14%	100.00%	0.03%	373,914.00
AUDIOBOOK	606	607	607	100.17%	100.00%	100.17%	1.20%	5,050.00
AV	3,700	3,721	4,365	117.97%	117.31%	100.57%	7.32%	17,525,301.40
BESTSELLER	116	143	162	139.66%	113.29%	123.28%	0.23%	137.95
BOOK	43,720	44,548	57,307	131.08%	128.64%	101.89%	86.44%	49,310,264.65
CD	7	7	7	100.00%	100.00%	100.00%	0.01%	3,034.00
EQUIPMENT	34	36	47	138.24%	130.56%	105.88%	0.07%	3,807.00
FILMSTRIP	1	1	1	100.00%	100.00%	100.00%	0.00%	0.00
KIT	9	10	35	388.89%	350.00%	111.11%	0.02%	2,895.01
LASERDISC	5	5	5	100.00%	100.00%	100.00%	0.01%	0.00
MAGAZINE	40	58	68	170.00%	117.24%	145.00%	0.08%	5,130.97
MAP	1	1	1	100.00%	100.00%	100.00%	0.00%	0.00
MICROFORM	14	18	22	157.14%	122.22%	128.57%	0.03%	2,875.00
NEW-AV	1	1	1	100.00%	100.00%	100.00%	0.00%	0.00
NEW-BOOK	15	16	17	113.33%	106.25%	106.67%	0.03%	13,311.94

- Click  on the toolbar or **Modes** in the Menu. The **Modes** dialog appears.

Modes ✓ Accept ✕ Cancel

Expand Hierarchy Levels when Nested:

☒ Expand Single/One Level Only (default)

☐ Expand Multiple/All Levels

Display Empty Rows and Columns:

☒ Exclude Empty Rows and Columns (default)

☐ Include Empty Rows and Columns

- Make changes as necessary.
- Click **Accept**. The report updates with the appropriate modes modified.

Directors Station by SirsiDynix Refreshed Tuesday, April 18, 2006

All Catalog Measures

Call Number Call Type Library Item Category 1 Item Category 2 Title Catalog Format

Year Published Date Copy Created Date Title Modified Date Title Created Title Modified By Title Created By

Date Title Cataloged Date Copy Inventoried Copy Reserve Status Current Location Home Location Items Price

Measures

ItemType	Total Titles	Total Call Numbers	Total Copies	% of Copies to Titles	% of Copies to Call Numbers	% of Call Numbers to Titles	% of Titles to Total Titles	Total Collection Value
All ItemType Total	50,580	51,592	67,983	134.41%	131.77%	102.00%	100.00%	104,115,309.94
ART-PRINT	8	8	9	112.50%	112.50%	100.00%	0.02%	3,040.00
ATLAS	14	14	106	757.14%	757.14%	100.00%	0.03%	373,914.00
AUDIOBOOK	606	607	607	100.17%	100.00%	100.17%	1.20%	5,050.00
AV	3,700	3,721	4,365	117.97%	117.31%	100.57%	7.32%	17,525,301.40
AV_CASS								
AV_DISC								
AV_FILM								
AV_SLIDE								
BESTSELLER	116	143	162	139.66%	113.29%	123.28%	0.23%	137.95
BIGBOOKS								
BOOK	43,720	44,548	57,307	131.08%	128.64%	101.89%	86.44%	49,310,264.65
BOOKBAG								
BOOK-LT								
BOOK-SP								
BOUND-PER								
CASSETTE								

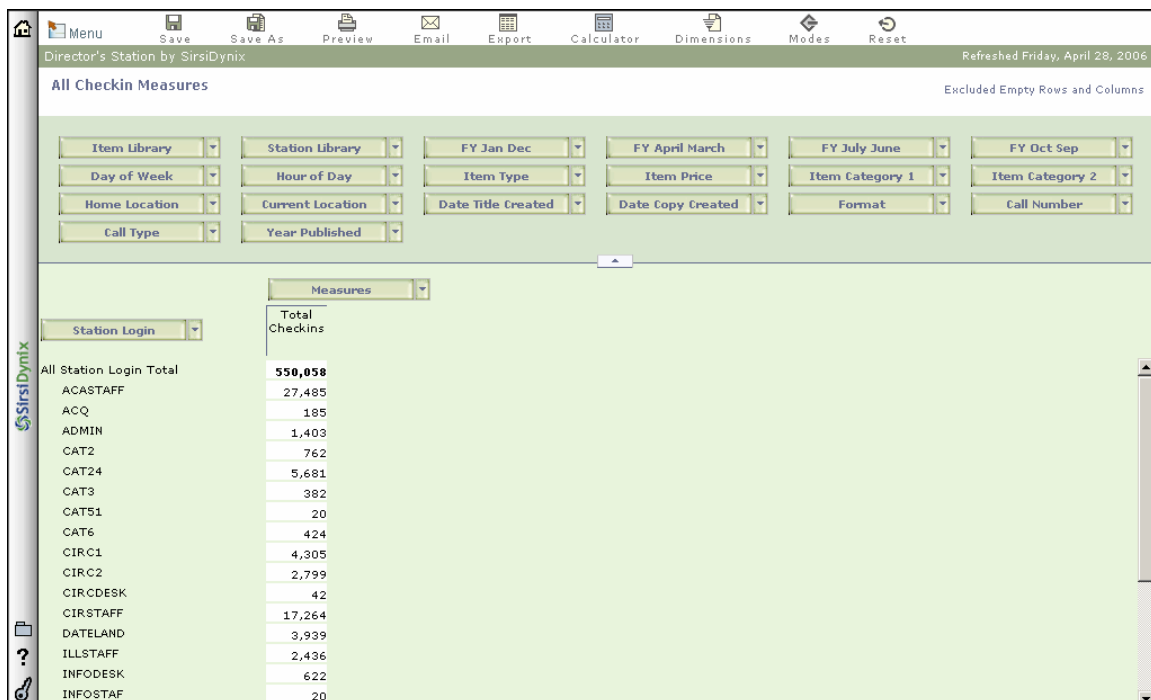
Charts

Charts give the user the ability visually analyze the data contained in reports. The user can highlight individual dimensions and measures to use within the chart.

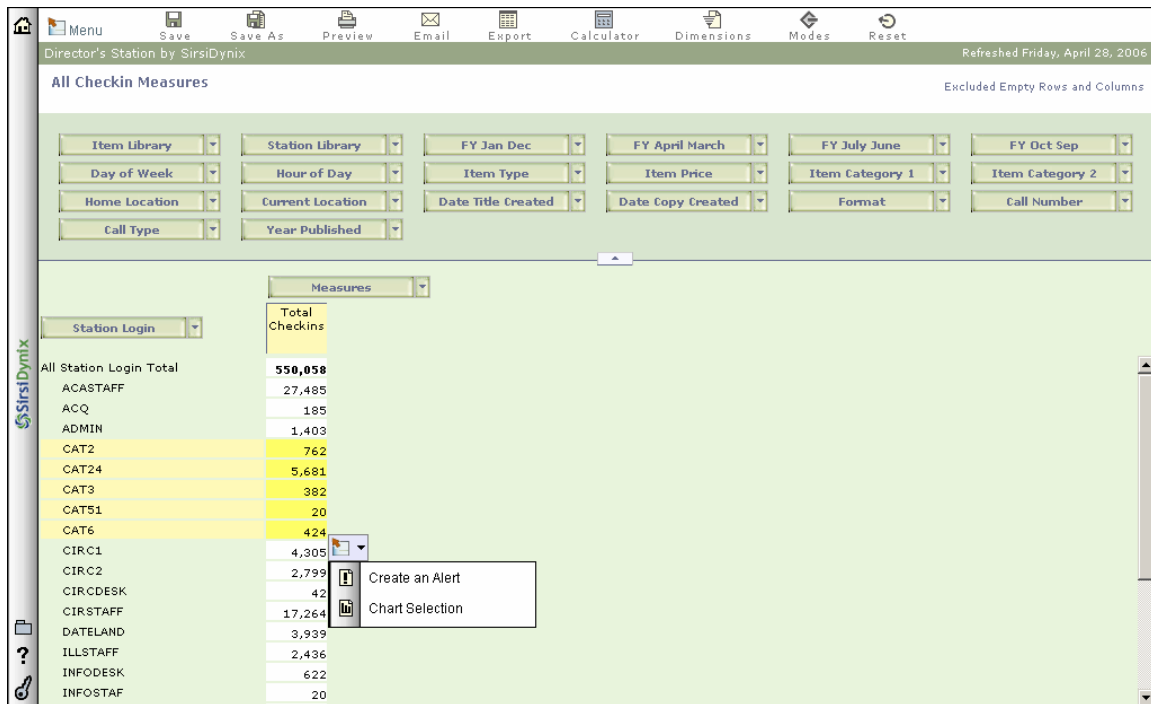
Creating Charts

To create a chart

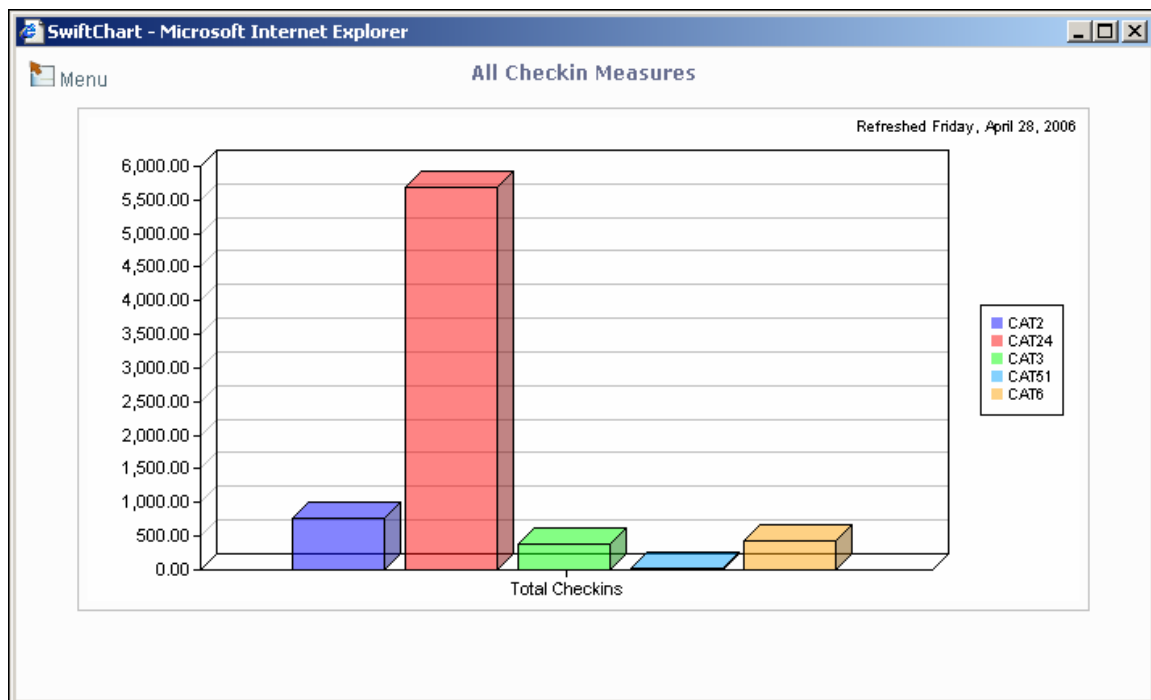
1. View or create a report in Director's Station.



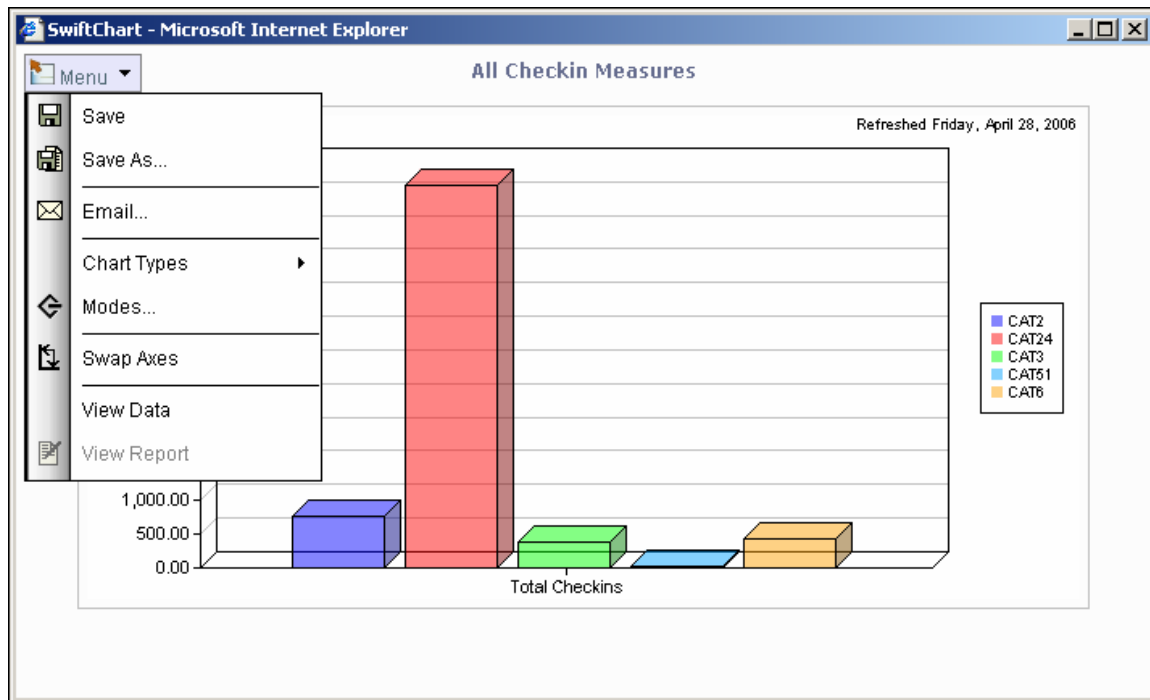
- Highlight data cells by positioning your cursor at the upper left corner of the first cell and dragging it to the lower right corner of the last. The **Select** menu appears.



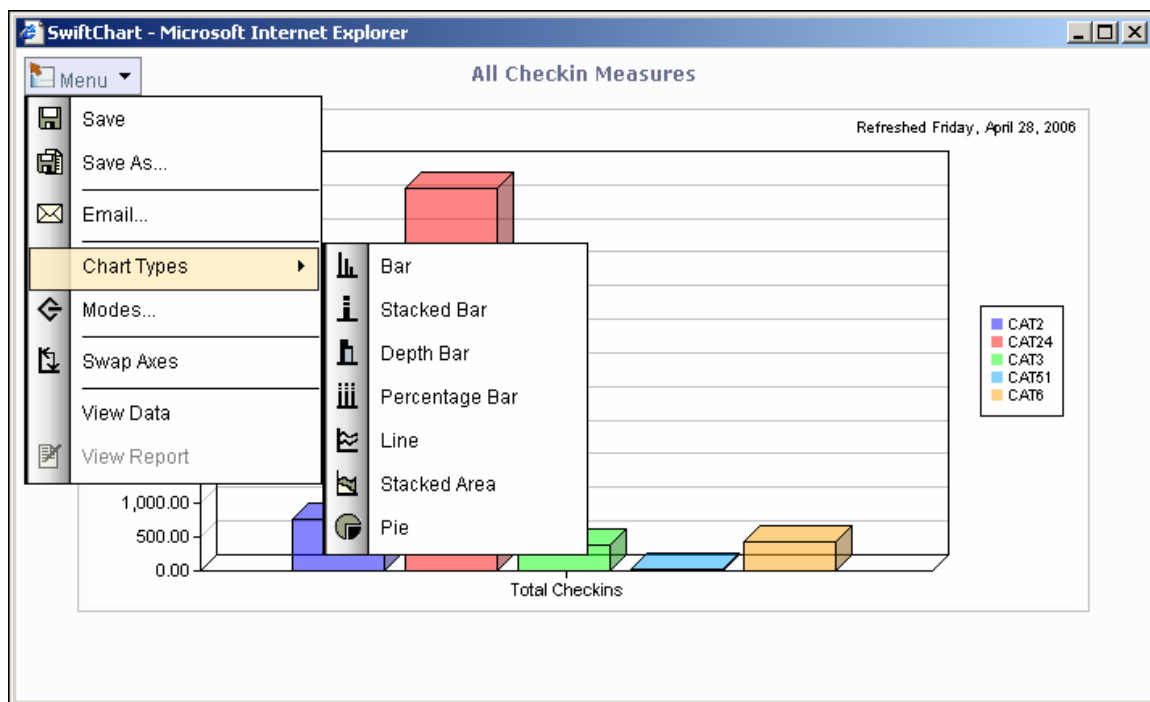
- Click the **Chart Selection**. The SwiftChart window appears.



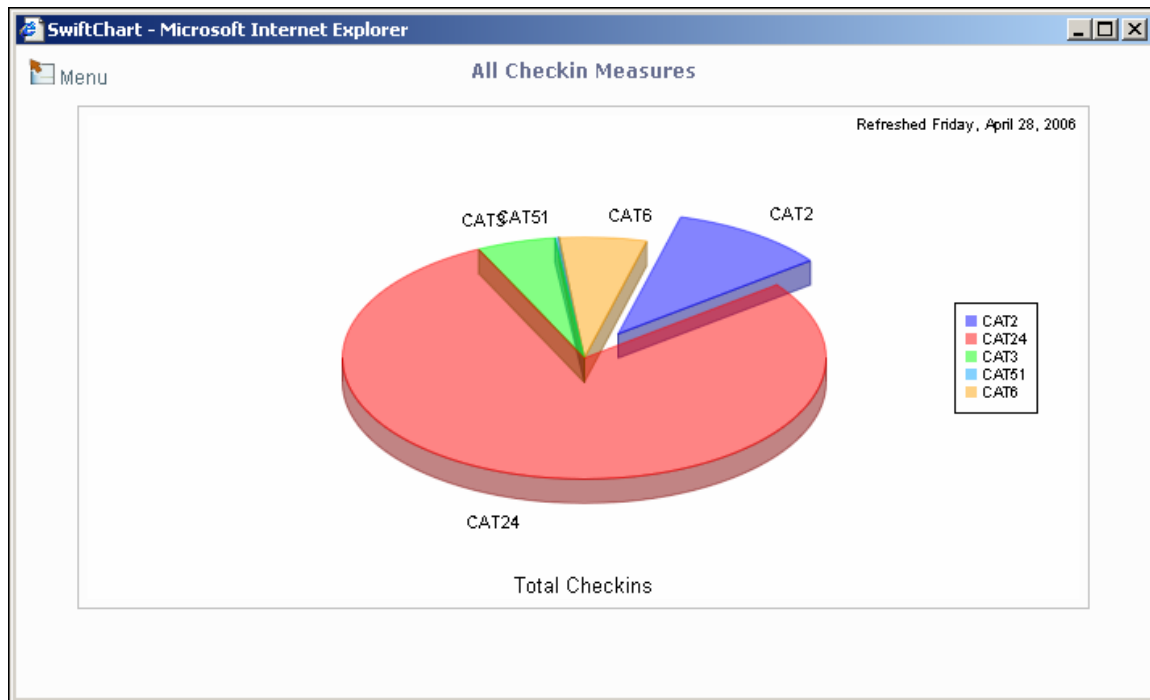
4. You can change the type of graph displayed using **Menu** options.



5. Click **Chart Types**.

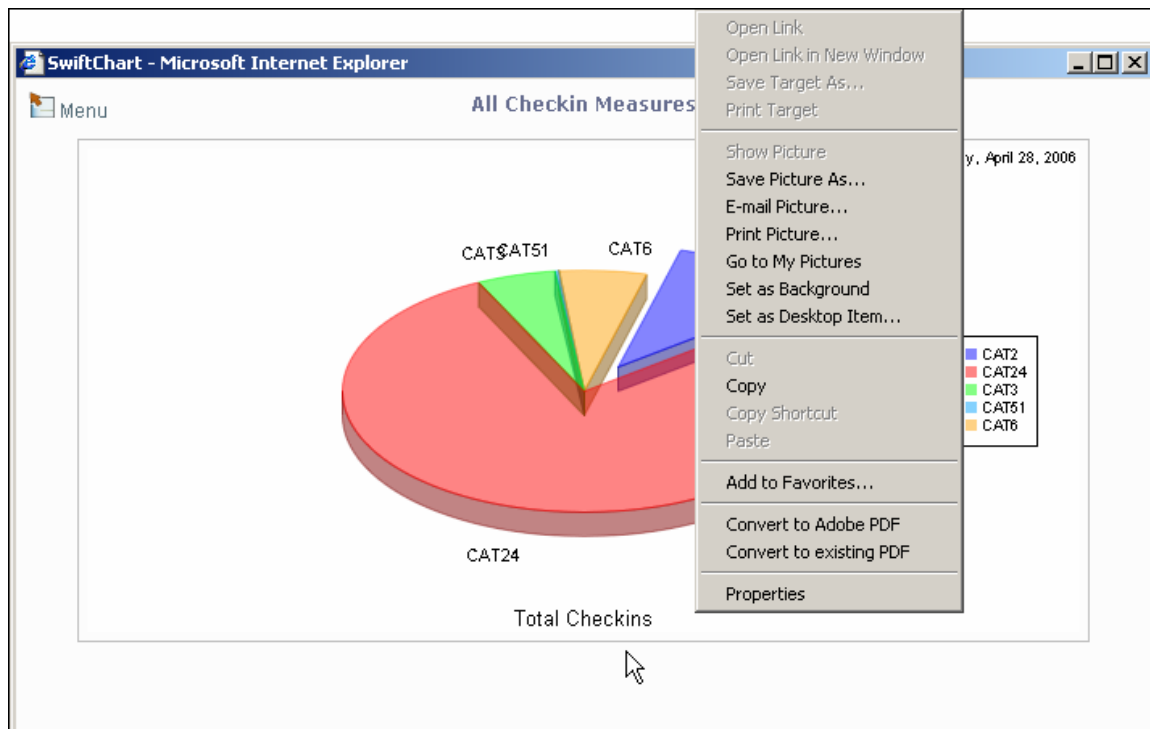


6. To create a pie chart, click **Pie**. The updated chart appears.



To use a chart in another application

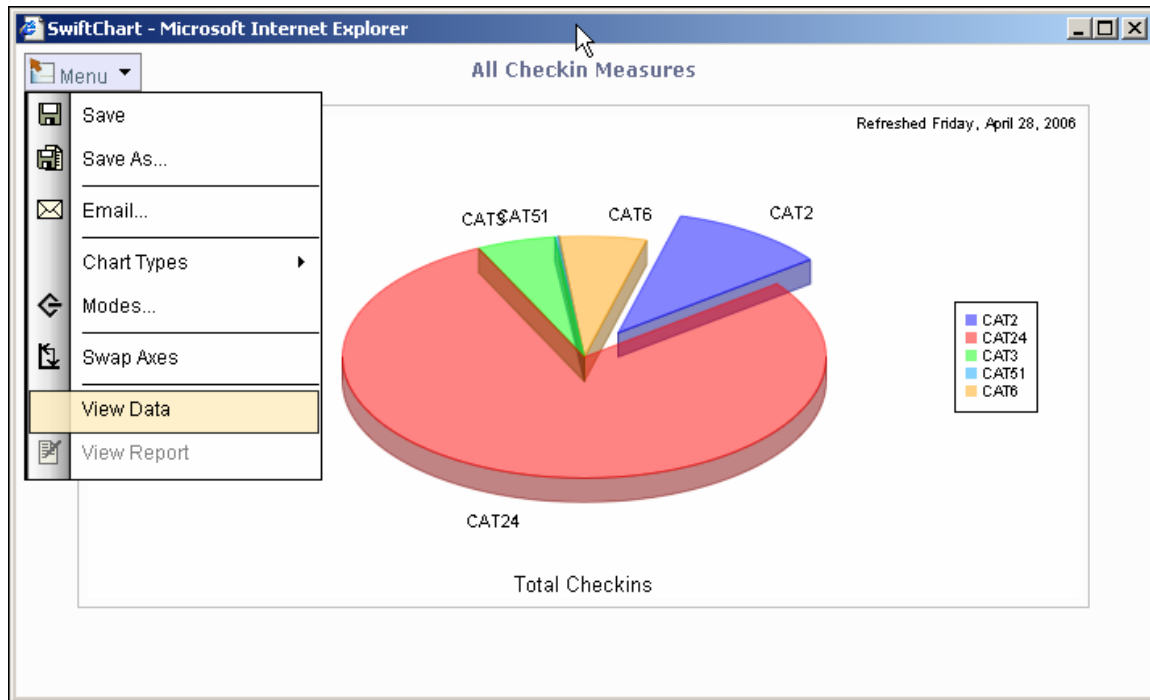
1. In the SwiftChart window, right click on the chart. The following options appear.



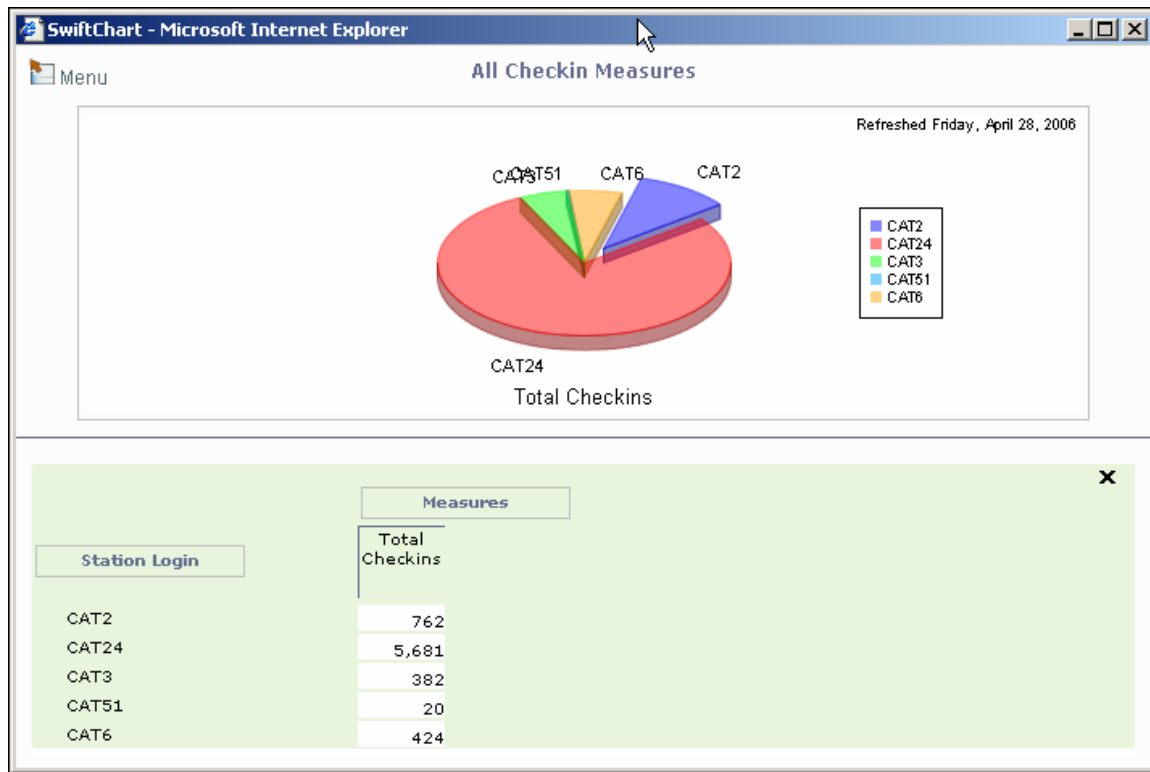
2. Click **Copy**. Paste the chart into the new application (such as Microsoft Word).

To view data of a chart

1. In the SwiftChart window, click **Menu** options.

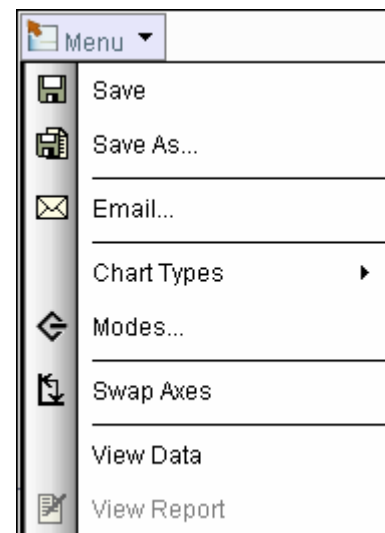


2. Click **View Data**. The SwiftChart window updates with report information.



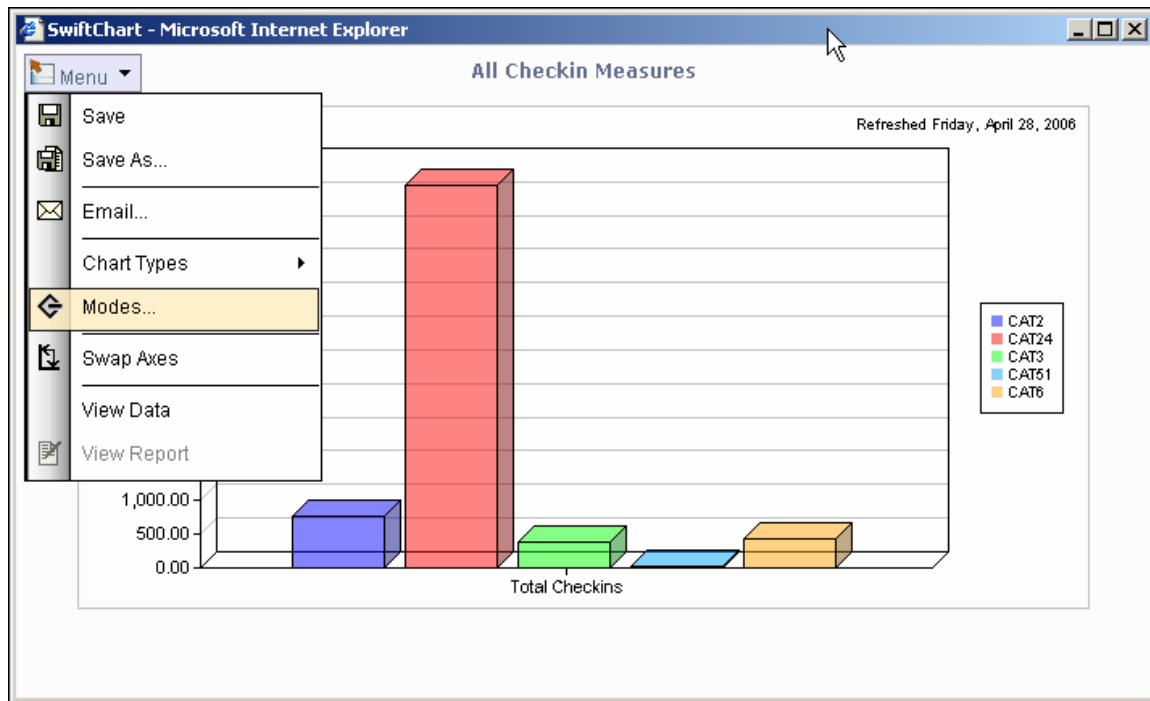
Charts Menu

When you create a chart or go to a saved chart, you can modify the appearance with the **Menu**. You can change the chart type, swap axes, and even view the report upon which the chart is based. The charts can also be saved to the dashboard or emailed to another Director's Station user.



Modes Menu

When you create a chart or go to a saved chart, you can change the modes to better display your data.



When you click **Modes**, the **Modes** dialog appears.

Modes

✓ Accept X Cancel

- ☒ Show Legend
- ☐ Show Values
- ☒ Show Refresh Date
- ☒ Scale from Zero
- ☐ Show Path
- ☒ Transparent
- ☒ 3-Dimensional

Automatic Alerts

When you view a report, you may find that a single measure is very important, and should therefore be flagged for alert analysis. Alerts allow you to determine whether you have gone over or under a threshold value. Alerts are saved only to your SwiftView Dashboard and not to any public folders.

Creating automatic alerts

To create an automatic alert

1. From the Dashboard, click an **All Measures** report template in the **SwiftAnalysis** panel.

The screenshot displays the 'Directors Station by SirsiDynix' interface. At the top, there is a menu bar with options: Menu, Save, Save As, Preview, Email, Export, Calculator, Dimensions, Modes, and Reset. Below the menu bar, the title 'Directors Station by SirsiDynix' is shown on the left, and 'Refreshed Tuesday, April 18, 2006' is on the right. The main section is titled 'All Bill Measures' and includes a note 'Excluded Empty Rows and Columns'. Below the title, there are several dropdown menus for filtering: Payment Date, Library, ItemType, Call Number, Call Type, Item Category 1, Item Category 2, Bill Reason, User Category 1, User Category 2, User Category 3, User Category 4, User Category 5, User Profile, Item Price, Date Billed, Birth Year, and Zip. A 'Measures' dropdown menu is also present. Below the filters, there is a table with the following data:

	Number of Bills	Total Amount Billed	Payment Amounts	Delinquent Patrons	Blocked Patrons	Barred Patrons
All Payment Type	2,575	338,767.14	164,232.70	762	129	0

The interface also features a vertical sidebar on the left with the SirsiDynix logo and a bottom status bar with a question mark icon.

- Click on the dimension text to expand the report and display all of the rows.

Directors Station by SirsiDynix Refreshed Tuesday, April 18, 2006

All Bill Measures Excluded Empty Rows and Columns

Payment Date Library ItemType Call Number Call Type Item Category 1
 Item Category 2 Bill Reason User Category 1 User Category 2 User Category 3 User Category 4
 User Category 5 User Profile Item Price Date Billed Birth Year Zip

Payment Type

	Number of Bills	Total Amount Billed	Payment Amounts	Delinquent Patrons	Blocked Patrons	Barred Patrons
All Payment Type Total	2,575	338,767.14	164,232.70	762	129	0
CANCEL			73,971.55			
CASH			84,151.59			
CHECK			301.00			
CREDITCARD			215.95			
FORGIVEN			5,592.61			

- Highlight a cell by clicking on the measure. The **Select** menu appears.

Directors Station by SirsiDynix Refreshed Tuesday, April 18, 2006

All Bill Measures Excluded Empty Rows and Columns

Payment Date Library ItemType Call Number Call Type Item Category 1
 Item Category 2 Bill Reason User Category 1 User Category 2 User Category 3 User Category 4
 User Category 5 User Profile Item Price Date Billed Birth Year Zip

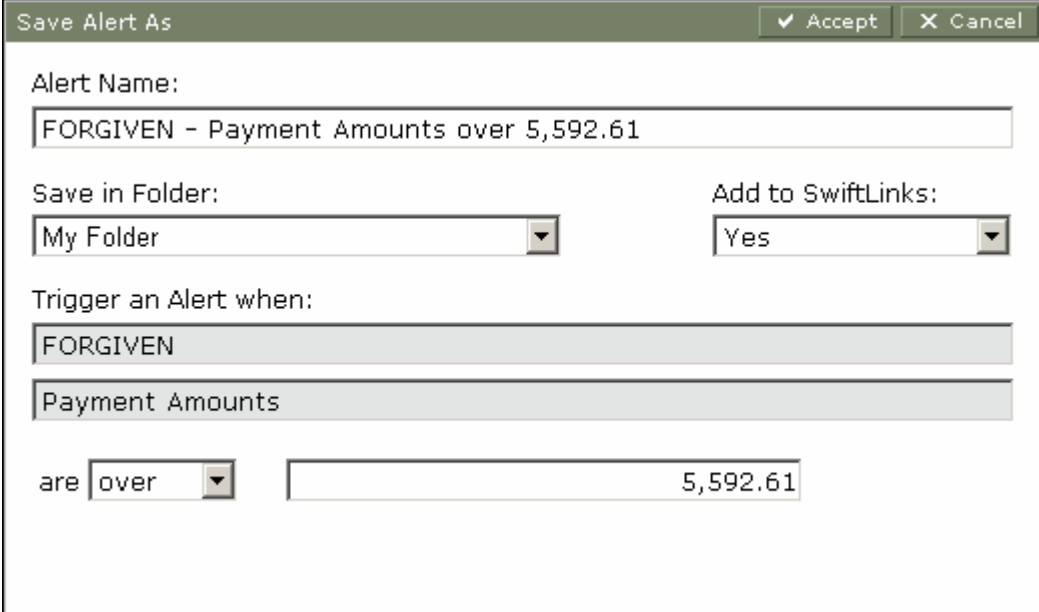
Payment Type

	Number of Bills	Total Amount Billed	Payment Amounts	Delinquent Patrons	Blocked Patrons	Barred Patrons
All Payment Type Total	2,575	338,767.14	164,232.70	762	129	0
CANCEL			73,971.55			
CASH			84,151.59			
CHECK			301.00			
CREDITCARD			215.95			
FORGIVEN			5,592.61			

Create an Alert
Chart Selection

Note You cannot create an alert for multiple cells in a report.

4. Click **Create an Alert**. The Save Alert As dialog appears.



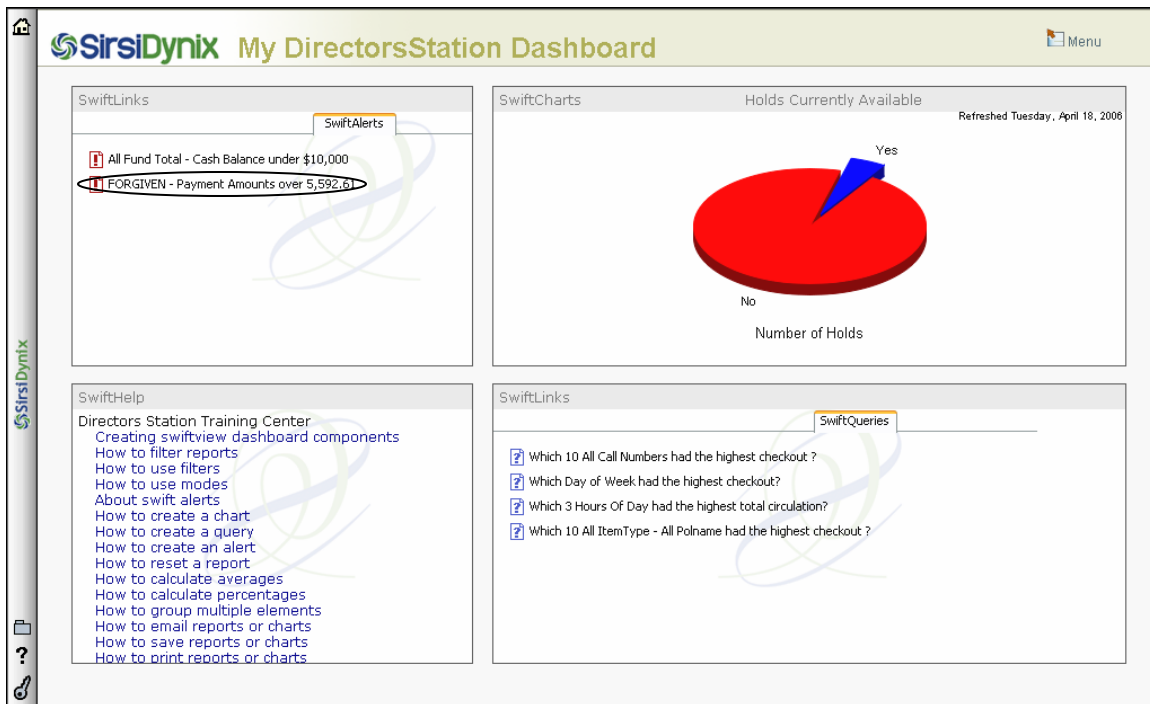
The image shows a 'Save Alert As' dialog box with the following fields and options:

- Alert Name:** A text field containing 'FORGIVEN - Payment Amounts over 5,592.61'.
- Save in Folder:** A dropdown menu showing 'My Folder'.
- Add to SwiftLinks:** A dropdown menu showing 'Yes'.
- Trigger an Alert when:** A list box containing 'FORGIVEN' and 'Payment Amounts'.
- are** followed by a dropdown menu showing 'over' and a text field containing '5,592.61'.

At the top right of the dialog are 'Accept' and 'Cancel' buttons.

5. Change the Alert Name.
6. Use the **are** list to change over/under.
7. Change the amount.

8. Click **Accept**. The new alert now appears in SwiftAlerts on the Dashboard.



Note An alert must be saved both to My Folder and to SwiftLinks in order for it to appear in the SwiftAlerts panel on the SwiftView. The ability to edit alerts will be available in a future release of the software.

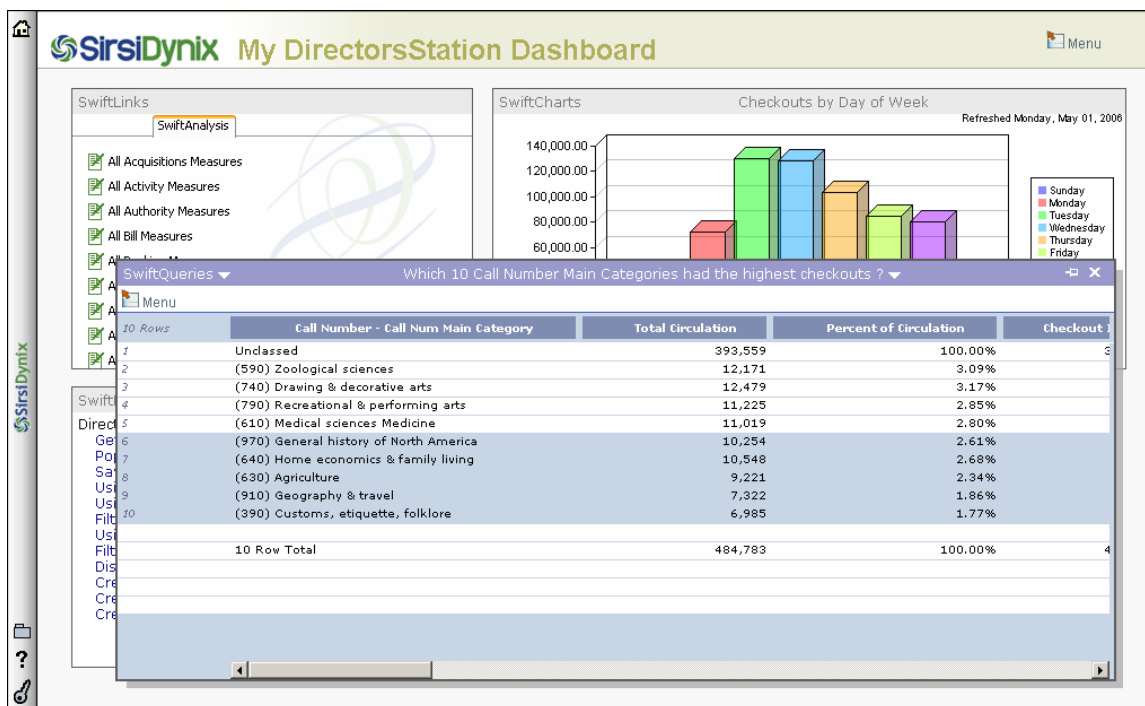
Queries

Queries provide another way for the user to analyze data. You can ask questions about ranges of data, the highest and lowest measures of data, or ask questions across different types of data. You can also ask follow up questions to produce a more focused answer. Once you have the data you want from the Query it can even be imported back into the standard SwiftAnalysis display and modified as if it were any other report.

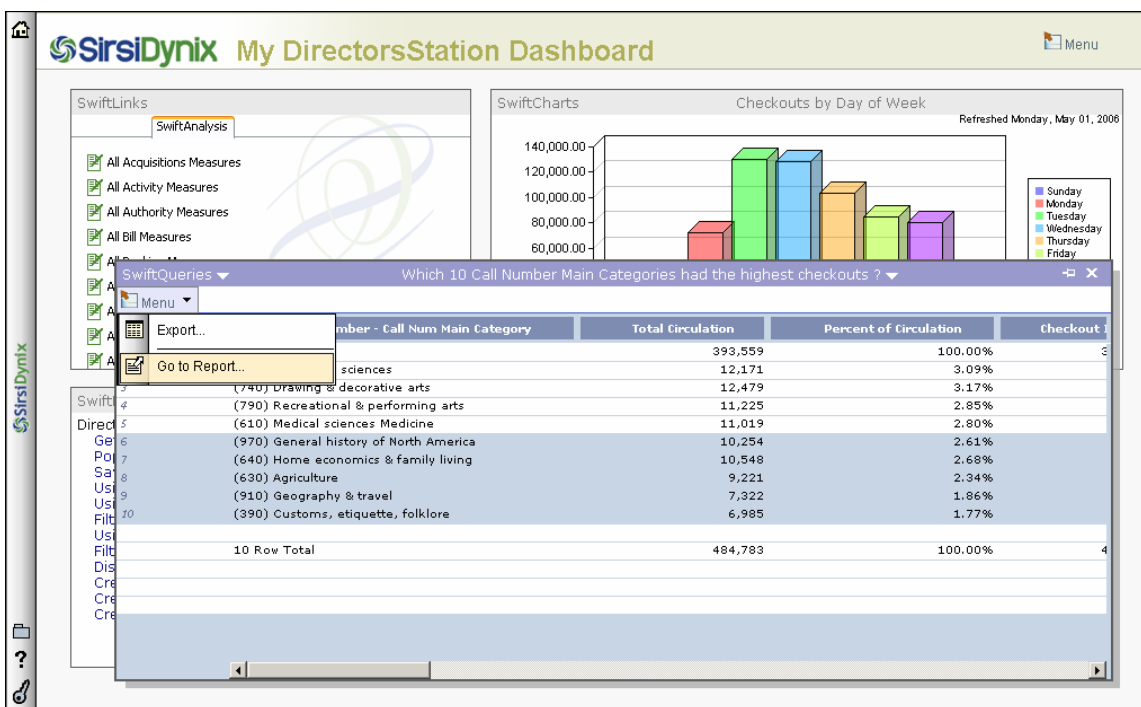
Creating queries

To create a query

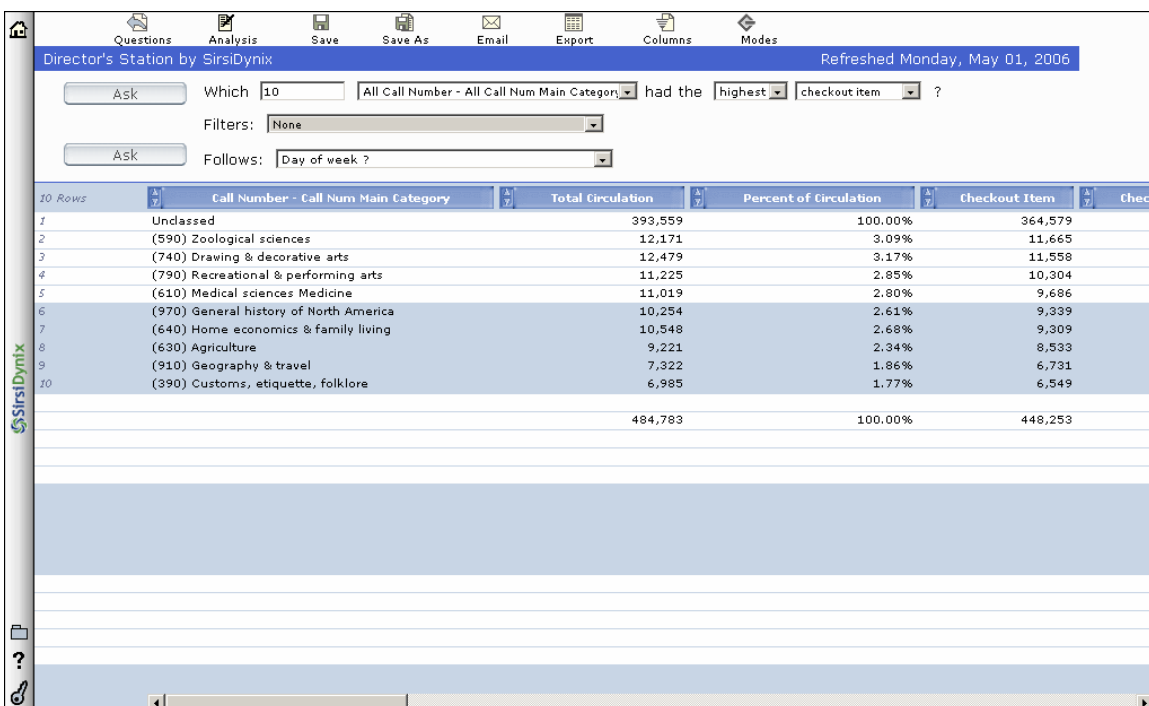
1. From the Dashboard, click the **SwiftQueries** panel.




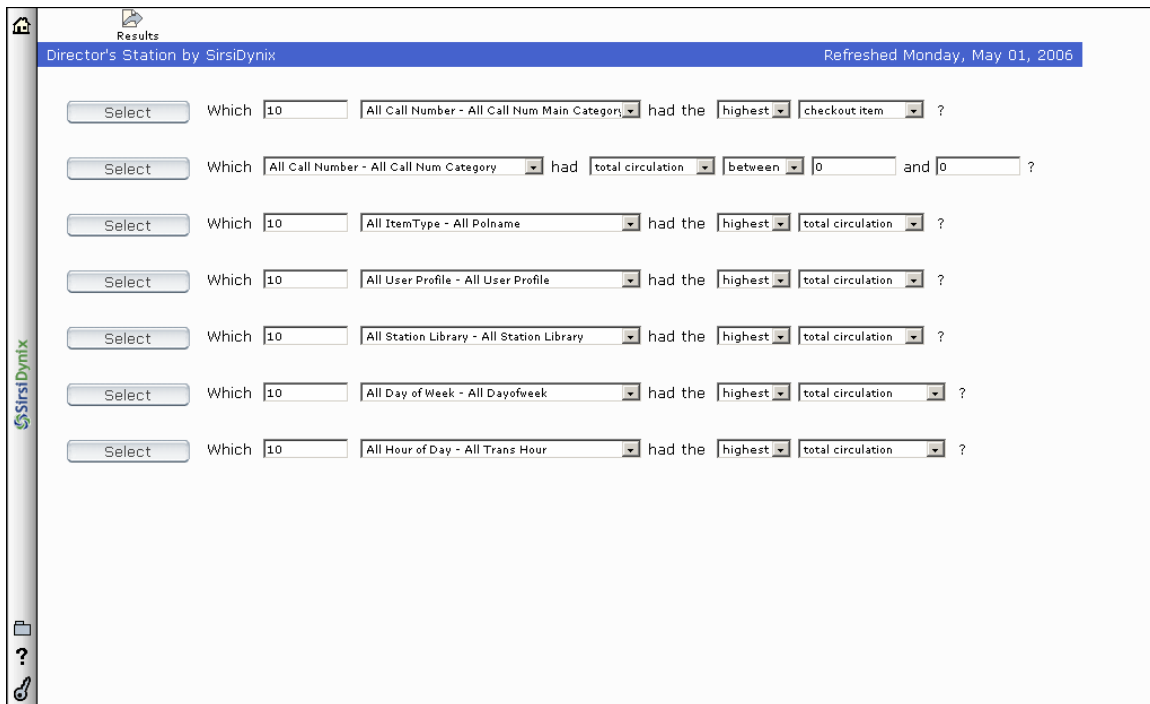
2. Click **Menu**.



3. Click **Go to Report**. The full report view appears.



4. To create a new query, click  **Questions** on the toolbar. The following information appears.



Results
Director's Station by SirsiDynix Refreshed Monday, May 01, 2006

Select Which 10 All Call Number - All Call Num Main Category had the highest checkout item ?

Select Which All Call Number - All Call Num Category had total circulation between 0 and 0 ?

Select Which 10 All ItemType - All Polname had the highest total circulation ?

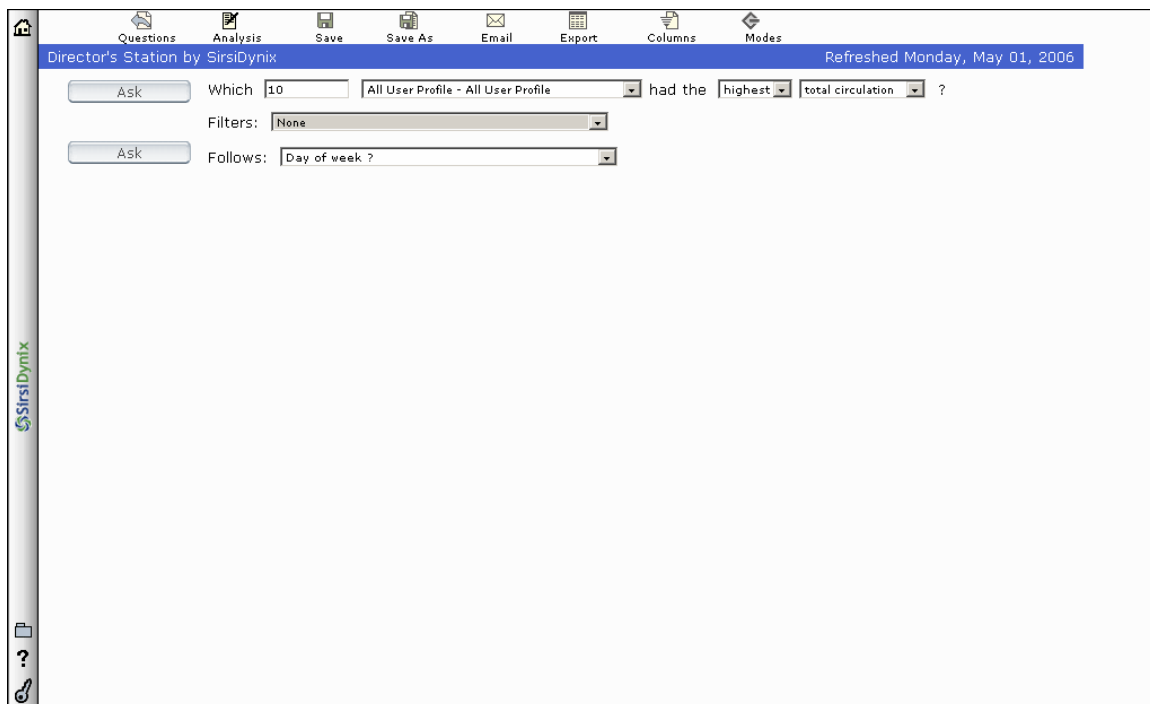
Select Which 10 All User Profile - All User Profile had the highest total circulation ?

Select Which 10 All Station Library - All Station Library had the highest total circulation ?

Select Which 10 All Day of Week - All Dayofweek had the highest total circulation ?

Select Which 10 All Hour of Day - All Trans Hour had the highest total circulation ?

5. Click **Select** for one of the questions. The individual question appears.



Questions Analysis Save Save As Email Export Columns Modes
Director's Station by SirsiDynix Refreshed Monday, May 01, 2006

Ask Which 10 All User Profile - All User Profile had the highest total circulation ?

Filters: None

Ask Follows: Day of week ?

6. Make changes to the question as necessary. Use the **Filters** field to narrow down the data by other dimensions such as library, home location, item categories, user categories, etc.
7. Click **Ask**. The query appears below the question.

Director's Station by SirsiDynix Refreshed Monday, May 01, 2006

Ask Which 10 All User Profile - All User Profile had the highest total circulation ?

Filters: None

Ask Follows: Day of week ?

10 Rows	User Profile - User Profile	Total Circulation	Percent of Circulation	Checkout Item	Checkout Reser
1	ADULT	294,799	100.00%	271,361	
2	JUV	113,955	38.66%	108,209	
3	YA	34,605	11.74%	31,305	
4	WINTER-RES	23,497	7.97%	22,329	
5	STUDENT	23,112	7.84%	16,999	
6	CATALOGING	21,768	7.38%	21,675	
7	TEMP6	14,861	5.04%	13,934	
8	OUTREACH	12,636	4.29%	10,061	
9	CAT24	8,200	2.78%	8,162	
10	STAFF	8,178	2.77%	5,873	
		555,611	100.00%	509,908	

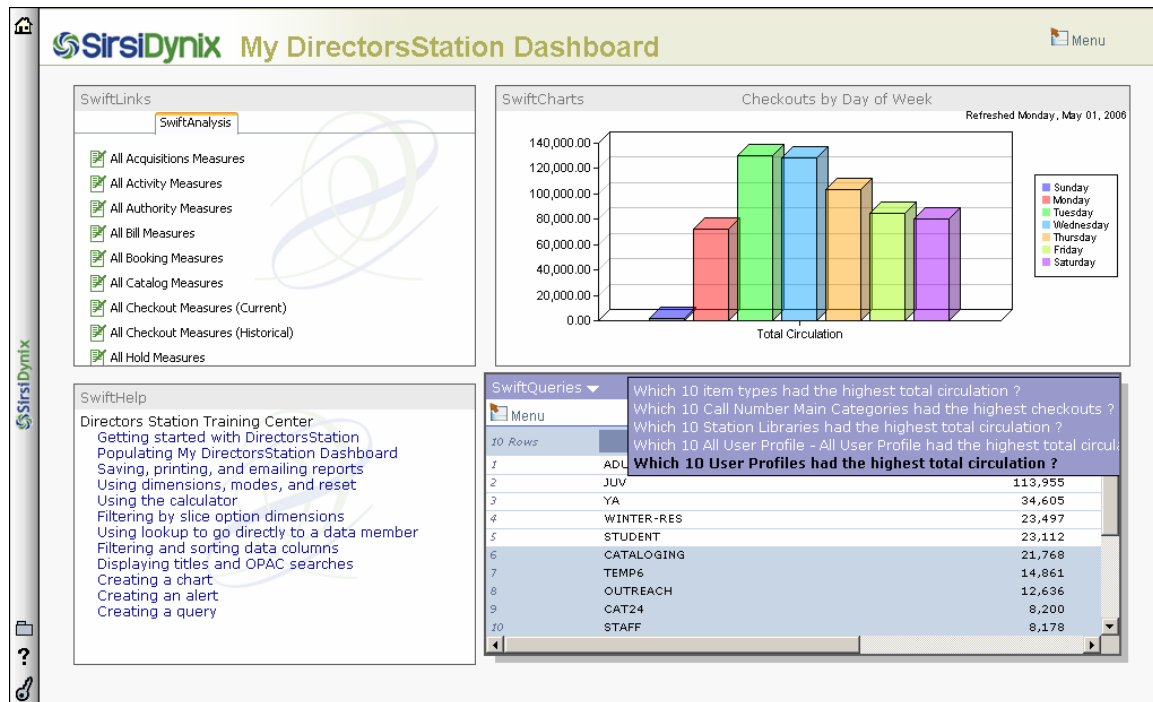
8. Use the toolbar to **Save**, **Email**, or **Export** the query. If you select **Save**, the **Save As** dialog appears. You can modify the **Report Name** in this location.

Save As Accept Cancel

Report Name:
Which 10 User Profiles had the highest total circulation ?

Save in Folder: My Folder and SwiftLinks: Yes

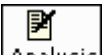
- Click **Accept**. A saved query appears on your Dashboard in the SwiftQueries panel.



Converting a Query into a Report

To convert a query into a report in order to specify a date range

- Click on an existing query in the dashboard.
- Click **Menu**.
- Click **Go to Report**.

- Click  **Analysis** on the toolbar.
- Make changes to the report as needed.


SwiftLinks

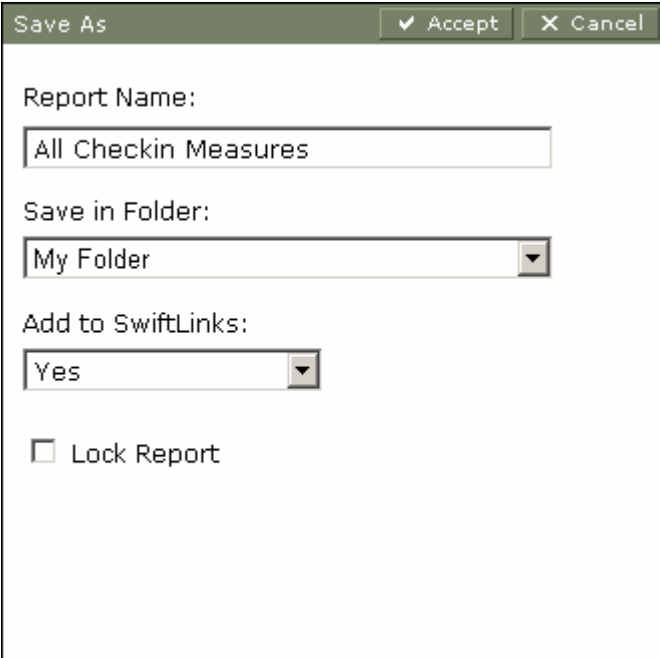
The SwiftLinks panel on the Dashboard contains links to reports, charts, alerts, and queries. A number of the delivered reports are available here for quick access. You may also save customized reports, charts, alerts, and queries to the SwiftLinks panel.

Saving Links

Director's Station allows you to save links to your customized reports, charts, alerts, and queries. These links appear in the SwiftLinks panel of your Dashboard for easy access.

To save a link

1. Click  on the toolbar or **Save As** in the Menu options to create a new report, chart, alert, or query. The **Save As** dialog appears.



The image shows a 'Save As' dialog box with a title bar containing 'Save As', 'Accept', and 'Cancel' buttons. The dialog contains the following fields and options:

- Report Name:** A text input field containing 'All Checkin Measures'.
- Save in Folder:** A dropdown menu showing 'My Folder'.
- Add to SwiftLinks:** A dropdown menu showing 'Yes'.
- Lock Report:** An unchecked checkbox.

2. Select **Yes** for **Add to SwiftLinks** to save this report, chart, alert, or query to the SwiftLinks panel on your Dashboard.

Sorting links

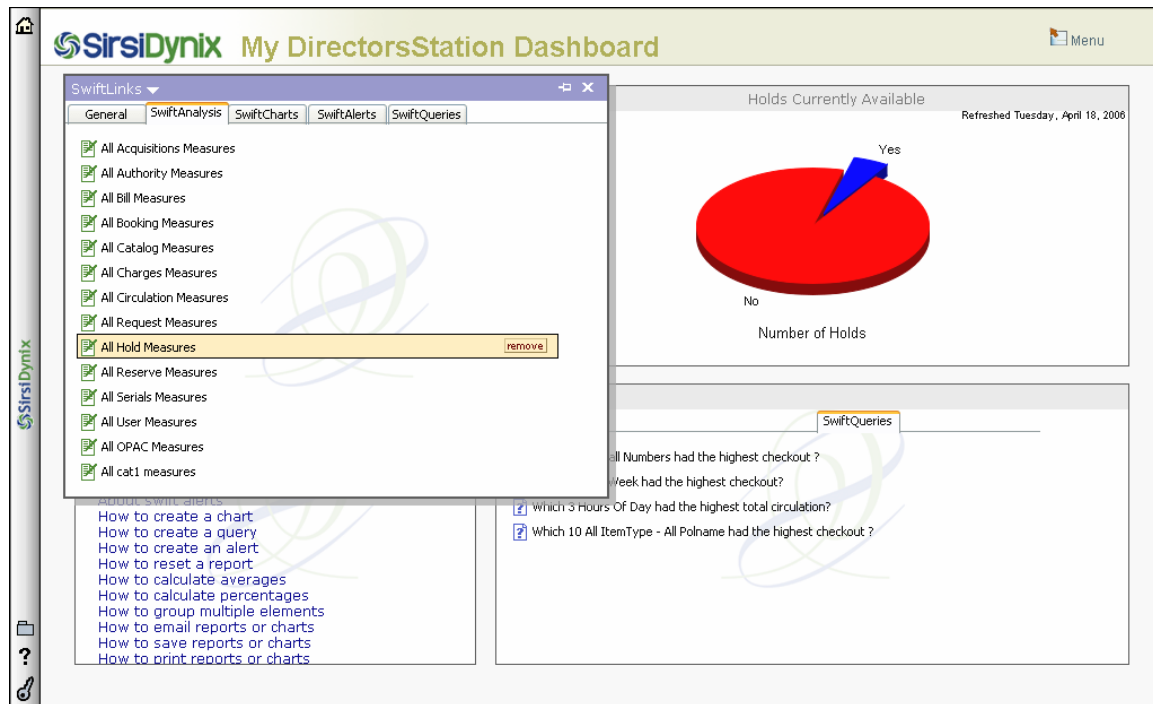
Links within the SwiftLinks panel may be sorted by the user. Click and drag each link to rearrange the reports, charts, alerts, and queries into any order the user would like.

The screenshot displays the SirsiDynix My DirectorsStation Dashboard. The main header includes the SirsiDynix logo and the title 'My DirectorsStation Dashboard'. A 'Menu' button is located in the top right corner. The dashboard is divided into several sections:

- SwiftLinks Panel:** A panel on the left side with tabs for 'General', 'SwiftAnalysis', 'SwiftCharts', 'SwiftAlerts', and 'SwiftQueries'. Under the 'SwiftAnalysis' tab, there is a list of measures:
 - All Acquisitions Measures
 - All Authority Measures
 - All Bill Measures
 - All Booking Measures
 - All Catalog Measures
 - All Charges Measures
 - All Circulation Measures
 - All Request Measures
 - All Hold Measures
 - All Reserve Measures
 - All Serials Measures
 - All User Measures
 - All OPAC Measures
 - All cat1 measures
 A red line highlights the 'All Serials Measures' link, and a mouse cursor is shown hovering over it. Below the list, there are links for 'How to create a chart', 'How to create a query', 'How to create an alert', 'How to reset a report', 'How to calculate averages', 'How to calculate percentages', 'How to group multiple elements', 'How to email reports or charts', 'How to save reports or charts', and 'How to print reports or charts'.
- Holds Currently Available:** A section on the right side featuring a 3D pie chart. The chart is titled 'Holds Currently Available' and 'Refreshed Tuesday, April 18, 2006'. The chart shows two segments: a large red segment labeled 'No' and a small blue segment labeled 'Yes'. The x-axis is labeled 'Number of Holds'.
- SwiftQueries:** A section at the bottom right with a tab labeled 'SwiftQueries'. It contains several queries:
 - all Numbers had the highest checkout ?
 - Week had the highest checkout?
 - Which 3 Hours Of Day had the highest total circulation?
 - Which 10 All ItemType - All Polname had the highest checkout ?

Removing Links

Links within the SwiftLinks panel may also be removed. Click on the SwiftLinks panel and find the report, chart, alert, or query that you wish to remove. When it is highlighted, click **Remove**.



Note Removing a link from the SwiftLinks panel on your Dashboard does not remove the report, chart, alert, or query from My Folder.

My Folder


You can upload, organize, and manage documents and reports from Manage My Folder in Director's Station. My Folder is a personal folder that no other person can access without your username and password. All of your information regarding reports and alerts are saved here, as well as other possible links.

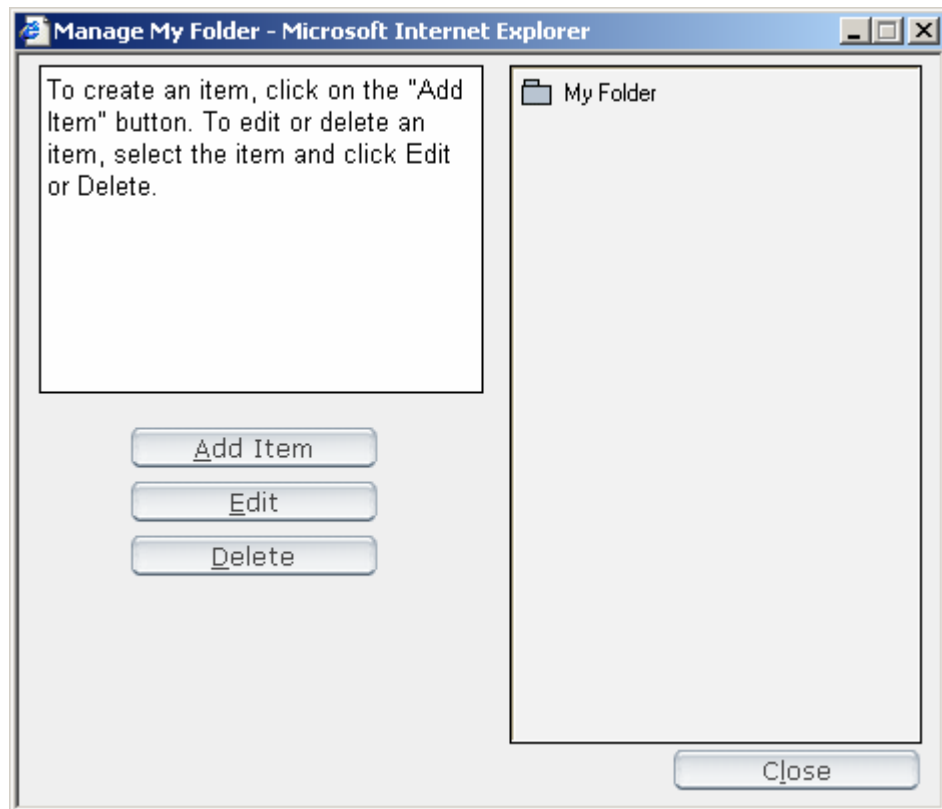
By default Manage My Folder contains a My Folder folder and an Email subfolder.

Manage My Folder

Adding Items

To add a new item to My Folder

1. Click the **Manage My Folder** icon  in the lower left corner of the window. The **Manage My Folder** window appears.



2. Click **Add Item**. The **Add Item** window appears.

The screenshot shows a dialog box titled "Add Item - Microsoft Internet Explorer". It has three tabs: "Links", "Folders", and "Documents". The "Links" tab is active. Inside the dialog, there are the following elements:

- A "Name:" label followed by a text input field.
- An "In Folder:" label followed by a dropdown menu currently showing "My Folder".
- A checkbox labeled "Local Link".
- A "URL:" label followed by a text input field.
- A "Description:" label followed by a larger text area with a vertical scrollbar.
- A "Save" button centered at the bottom.
- A "Close" button at the bottom right corner.

3. Choose a tab to begin adding items.
 - **Links** – Add internal and external hypertext links
 - **Folders** – Add subfolders for organizing reports
 - **Documents** – Add any type of document

Note In addition, you can add items by saving a report, chart, query, or alert to My Folder.

To add a new link to My Folder

1. From Add Item, click the **Links** tab.
2. Enter a **Name** for the link.
3. For **In Folder**, select the folder or subfolder where the link will be stored.
4. Indicate whether the link is a **Local Link** or a web link.

5. Enter the **URL** for the link. A local link includes the drive letter and path to an individual file on the Director's Station server. The path should include the Director's Station root directory.

C:\Program Files\SwiftKnowledge Inc\Swiftknowledge\DTApp

Folders of *.html* files can be retained for linking. A Web link requires an *http://* prefix.

6. Add a **Description** if desired.
7. Click **Save**.

To add a new folder to My Folder

1. From Add Item, click the **Folders** tab.
2. Enter a **Name** for the folder.
3. Indicate whether the item will **Allow Anonymous** access.

Note	Allow Anonymous means that the folder will be available before logging in to Director's Station. If the user clicks open the Popout menu in the initial Director's Station login screen, they will see those items saved as anonymous.
-------------	--

4. For **In Folder**, select the folder or subfolder where the folder will be stored.
5. Click **Save**.

Note	Top level category folders are managed in Manage Categories, which allows the management of a subfolder in a category. There is no limit to the number or depth of subfolders that can be added within a category.
-------------	--

To add a new document to My Folder

1. From Add Item, click the **Documents** tab.
2. Enter a **Title** for the Document.
3. For **In Folder**, select the folder or subfolder where the document will be stored.
4. Select the document **Type**, such as Excel, Word, PowerPoint, or Other. Any type of file can be selected. The type indicates what icon will be used on the menu. The icon is displayed next to the type when a type is selected. If you set the type for a Word document to an Excel spreadsheet, the document will still open

correctly; it will simply have an Excel icon on the menu.

5. Locate the **File**. Use the Browse button to select a file on your local machine.

Note	When uploading documents it is easiest to start by selecting the File since other fields will auto-populate based on the file information. To fill this field, type the path and file name or browse to the file you wish to upload. The Title and Type will then auto-populate.
-------------	--

6. Add a **Description**, if desired.
7. Click **Save**.

Note	All uploaded documents are transferred over the Internet and stored in the application database (<i>C:\Program Files\Swiftknowledge Inc\Swiftknowledge</i>). Administrators may want to limit the users who can upload documents since it may have an effect on bandwidth use and disk space. A loading box will appear while the document is being loaded. The time to load documents is directly related to the size of the file and the speed at which the data is transferred. If you are uploading a large file during a high traffic time, it may take a significant time to load.
-------------	--

Editing Items

When editing links it is important to know that all of the menu items are considered to be "links" once created in the menu and thus are all edited in the same way. The link information is displayed and can be changed. As a general rule you should not edit the URL for any items. Editing these URLs will likely cause the link to stop working. Changing the type of link has no effect other than changing the icon displayed.

1. Click the **Manage My Folder** icon.
2. Click **My Folder** to display the items that may be edited.
3. Select one of the items. The properties display in the white space.
4. Click **Edit**, and make the desired changes.
5. Click **Save**.

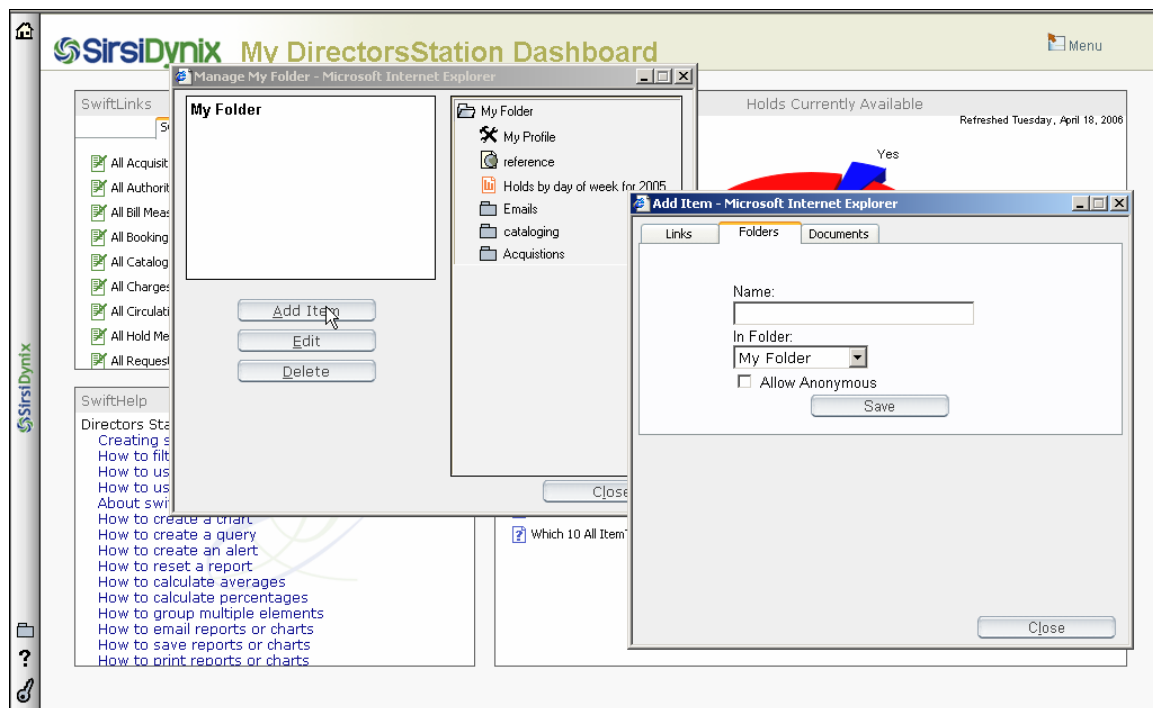
Deleting Items

1. Click the **Manage My Folder** icon.
2. Click **My Folder** to display the items that may be deleted.
3. Select one of the items. The properties display in the white space.
4. Click **Delete**
5. Click **OK** to confirm.

Note Deleting a subfolder will automatically delete all the links within this folder.

Storing Items

My Folder data can grow quickly and become unmanageable. You should use the Add Item, Folders option to develop a plan for storing your links, reports, charts, alerts and documents.



My Profile

Use My Profile to change your e-mail address or password.

✱ My Profile

First Name: Last Name:

E-Mail Address:

☐ Change Password (optional)

New Password:

Affirm Password:

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